



Grain Transportation Report

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CSX Restores Service Following Train Derailment in Kentucky.

On December 30, a train operated by CSX Transportation (CSX) [derailed near Trenton, KY](#)—about 17 miles southeast of Hopkinsville, KY. One of the derailed cars leaked molten sulfur, which caused a fire. On Thursday morning, [CSX said](#) it had restored service, and shipments were again moving through the area.

The derailment occurred on CSX's Henderson Subdivision, which runs between Evansville, IN, and Nashville, TN. Key for feed grain transportation, this route connects grain elevators in the eastern Corn Belt (around Evansville) to poultry and livestock operations in Alabama, Georgia, and other Southeastern States. In 2015, southbound corn flows on CSX's Henderson Subdivision totaled between 4 million and 6 million tons. (See flow maps in [The Role of Rail in Agricultural Transportation](#) on AgTransport.)

FMCSA Issues Multiregional Hours-of-Service Waiver for Hauling Fuel.

On December 23, with a multiregional emergency declaration, the Federal Motor Carrier Safety Administration (FMCSA) [waived hours-of-service \(HOS\) regulations](#) for drivers transporting heating fuel, including propane, natural gas, and heating oil.

Effective until January 15 or the end of the emergency, whichever comes first—the waiver applies to several States that are key to grain

transportation: Illinois, Iowa, Kansas, Kentucky, Ohio, Minnesota, Missouri, Nebraska, and Wisconsin.

FMCSA declared the emergency in response to a pipeline break and operational issues associated with the Mid-American Pipeline System; an unexpected shutdown of the Robinson Refinery in Illinois; and (in the States affected by the emergency declaration) winter storms and extreme cold—all of which severely disrupted the flow of propane.

Port of Duluth-Superior Completes 2025 Navigation Season.

On [December 23](#), the Miedwie, a handysize bulk carrier, departed the Port of Duluth-Superior, carrying durum wheat destined for Algeria and marking the end of the port's oceangoing navigation season: the St. Lawrence Seaway, which connects the Great Lakes to the Atlantic Ocean, will [close for the season on January 5](#).

According to USDA's Federal Grain Inspection Service data (available on [AgTransport](#)), wheat exports from the Port of Duluth-Superior were 321,800 metric tons in 2025—down 39 percent from 2024 and down 35 percent from the prior 5-year average.

Grain exports out of the Port of Duluth-Superior peaked in 1978 at 9.2 million metric tons. However, the port's grain volumes have been falling for decades. 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. In August 2025, CHS Inc. closed its 18-million-bushel grain export terminal at the Port of Duluth-Superior ([Grain Transportation Report, July 17, 2025, first highlight](#)).



Carmen K. Sisson - stock.adobe.com

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 December 18, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2025/26 totaled 43.11 million metric tons (mmt), unchanged from last week and up 4 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26 were 2.20 mmt, up 26 percent from last week. Net [soybean export sales](#) were 1.06 mmt, down 56 percent from last week. Net [wheat export sales](#) were 0.15 mmt, down 66 percent from last week.

Rail

U.S. Class I railroads originated 28,750 [grain carloads](#) during the week ending December 20. This was a 1-percent increase from the previous week, 8 percent more than last year, and 10 percent more than the 3-year average.

Average January [shuttle secondary railcar bids/offers](#) (per car) were \$863 above tariff for the week ending December 25. This was \$202 less than last week and \$756 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$38 above tariff. This was \$29 less than last week and \$71 lower than this week last year.

Barge

For the week ending December 27, [barged grain movements](#) totaled 404,341 tons. This was 20 percent less than the previous week and down 57 percent from the same period last year.

For the week ending December 27, 270 grain barges [moved down river](#)—47 fewer than last week. There were 513 grain barges [unloaded](#) in the New Orleans region, 41 percent fewer than last week.

Ocean

For the week ending December 25, 29 [oceangoing grain vessels](#) were loaded in the Gulf—3 percent fewer than the same period last year. Within the next 10 days (starting December 26), 40 vessels were expected to be loaded—17 percent fewer than from the same period last year.

Fuel

For the week ending December 29, the [U.S. average diesel fuel price](#) decreased 4.4 cents from the previous week to \$3.50 per gallon, 0.3 cents below the same week last year.



MY 2025/26 Starts for Corn and Soybean Shipments

Data from USDA's Federal Grain Inspection Service on soybean and corn export shipments in the first quarter of marketing year (MY) 2025/26 are available on [AgTransport](#). This article offers insight on soybean and corn exports from September through November—the first quarter of MY 2025/26 ([Grain Transportation Report \(GTR\) table 18](#)).¹ Despite not containing official trade data and not necessarily including all grain-export volumes, the FGIS dataset provides timely information on grain shipments and serves as a close proxy for official trade numbers ([GTR, October 27, 2022](#)).

Soybean Shipments Dip to Lowest in Over a Decade

In most years, U.S. soybean exports peak between October and November—when U.S. soybeans are priced competitively with South American soybeans. China, historically the largest buyer of U.S. soybeans, did not purchase its first MY 2025/26 U.S. soybeans until late October, and the first soybean shipment to China did not occur until late November. As a result, FGIS inspections data show China received just one cargo (49,000 metric tons) of U.S. soybeans in the first quarter.

The total volume of soybeans inspected for export in the first quarter totaled 12.3 million metric tons (mmt). Down 46 percent from the prior 5-year average, this first quarter total marked the slowest start to a marketing year since MY 2011/12.² Of the 12.3 mmt total, 11 percent (1.4 mmt) were containerized soybeans—up 5 percentage points from average. While soybean exports were down overall, shipments varied by export region.

Large Declines From Mississippi Gulf and PNW. The two largest export gateways for soybeans are the Mississippi Gulf (near New Orleans, LA) and the Pacific Northwest (PNW)—composed of the Columbia River in Oregon and Puget Sound in Washington State. In the first quarter, soybean shipments from the Mississippi Gulf totaled 7.6 mmt—down 35 percent from average. Losses in the PNW were greater than in the Mississippi Gulf. Between MY 2020/21 and MY 2024/25, 99 percent of all first-quarter soybean shipments from PNW export terminals were destined to China.

In first quarter MY 2025/26, soybean shipments from the PNW totaled 0.7 mmt—down 90 percent from average and the lowest first-quarter total since MY 1999/2000. Ships loading soybeans for export from PNW export

terminals, totaled 13 in this marketing year's first quarter, versus 94 in first quarter MY 2024/25.

Most soybeans arrive to the PNW by rail from areas in the western Corn Belt—such as Minnesota, North Dakota, and South Dakota. Rail-served elevators in these States depend on a PNW export market for soybeans, so as first-quarter soybean exports dropped, local soybean prices also declined.³

Shipments to Mexico and From Texas Gulf Rise Markedly. Though historically much smaller than either Mississippi Gulf or PNW soybean shipments, first-quarter soybean shipments from the Texas Gulf (e.g., ports of Houston and Corpus Christi) and rail shipments to Mexico were above average.

Mexico, typically, the second-largest buyer of U.S. soybeans, became the top destination for U.S. soybeans and received 21 percent above average. Of the total 1.7 mmt first-quarter soybean shipments to Mexico, 60 percent were shipped overland by rail, and 40 percent were shipped by ocean vessel. For first-quarter soybean shipments to Mexico by rail from MY 2020/21 to MY 2024/25, the top originating States (in descending order) were Missouri,

1 In this article, “first quarter” refers to the months of September, October, and November—the first quarter of the marketing year for corn and soybeans.

2 In this article, “average” refers to the prior 5-year average.

3 A [study](#) by North Dakota State University found that soybean prices in rail-dependent areas of the Northern Plains fell below \$8.50 per bushel leading up to the fall 2025 harvest—significantly below the cost of production.

Nebraska, and Kansas. In first quarter MY 2025/26, North Dakota was the third-largest originating State for railed soybeans to Mexico.

Soybean shipments increased from the Texas Gulf because ocean freight rates were lower from that port region than from the PNW to many destinations, though not East Asian ones. At 1.2 mmt, first-quarter soybean shipments from the Texas Gulf were 67 percent above average and the largest since first quarter MY 2020/21. The Texas Gulf did not ship any soybeans in September, but October shipments totaled 0.6 mmt, and November shipments totaled 0.5 mmt. The top destinations of these shipments were Egypt, Germany, Bangladesh, Mexico, and Pakistan. (Each of these destinations received at least 100,000 metric tons.)

Rail shipments of soybeans to Mexico and the Texas Gulf were also incentivized by railroad pricing adjustments. Beginning September 1, BNSF Railway (BNSF) reduced shuttle train soybean rates to Mexico by \$1,000 per car, and reduced shuttle train soybean rates to the Texas Gulf by \$1,500 per car. Similarly, Union Pacific Railroad reduced its shuttle train soybean rates to the U.S. Gulf by \$1,500 per car, and reduced shuttle train soybean rates to Mexico by \$1,300 per car.

Because BNSF left rates to the PNW the same, every elevator on BNSF's shuttle network has a lower tariff rate to the Texas Gulf and Mexico than to the PNW ([GTR, August 7, 2025](#))—a

significant change from previous years. For example, in MY 2024/25, a shuttle train shipment of soybeans from Argyle, MN, to the PNW (\$6,135 per car) was \$550 less than the cost to ship soybeans to the Texas Gulf (\$6,685 per car). In MY 2025/26, that spread was sharply reversed: the same shipment from Argyle was \$950 less to ship to the Texas Gulf (\$5,185 per car) than to the PNW (\$6,135 per car) ([GTR table 7](#)).

Buoyed by Harvest and Filling in for Soybeans, Corn Shipments Surge

Less seasonal than soybean exports, corn exports are typically slightly lower in the first quarter than in the second and third quarters of the marketing year (roughly February-June), when soybean exports are at a low ebb. In first quarter this year, however, corn shipments were at record levels—reflecting both abundant supplies and additional logistical capacity owing to low soybean shipments. The total volume of corn inspected for export in the first quarter was 19.9 mmt—a record high for first-quarter shipments and more than double the first-quarter average (9.3 mmt).

Corn Exports Buoyed by Record Harvest.

According to USDA/National Agricultural Statistics Service's (NASS) November [Crop Production](#) report, U.S. farmers harvested an estimated 16.8 billion bushels (or about 425.5 mmt) this fall. If the estimate is accurate, this total would set a record—exceeding the 2023

harvest by about 1.4 billion bushels. While production was above average in most States, some of the largest estimated corn production increases from average (in percentage terms) were in western Corn Belt States—Kansas (up 31 percent); North Dakota (up 55 percent); and South Dakota (up 37 percent).

Corn Exports Higher in All Regions—

Epecially PNW. From the Mississippi Gulf, the largest corn export gateway, first-quarter corn shipments totaled 9.3 mmt—up 68 percent from average and the highest since the first quarter of MY 2007/08. Similarly, first-quarter corn exports railed to Mexico (3.9 mmt), were up 55 percent from average, marking the strongest first quarter total on record. Shipments were also well above average in smaller export gateways—such as those in North Texas, South Atlantic, and Toledo, OH.

However, of all the gateways with rising corn exports, the PNW saw the largest increase. PNW corn shipments totaled a record 5.5 mmt—673 percent above average. This year, the first-quarter rise in PNW corn shipments mostly offset lost soybean shipments. First quarter PNW grain shipments—corn, soybeans, and wheat—totaled 9.8 mmt ([fig. 1](#)). That total's percent-drop from average (6 percent), while significant, was dwarfed by that of the soybean total alone—down 90 percent from average. Clearly, for moving the record corn harvest to PNW export terminals, corn shippers benefited from low soybean demand, which freed up rail and port capacity.

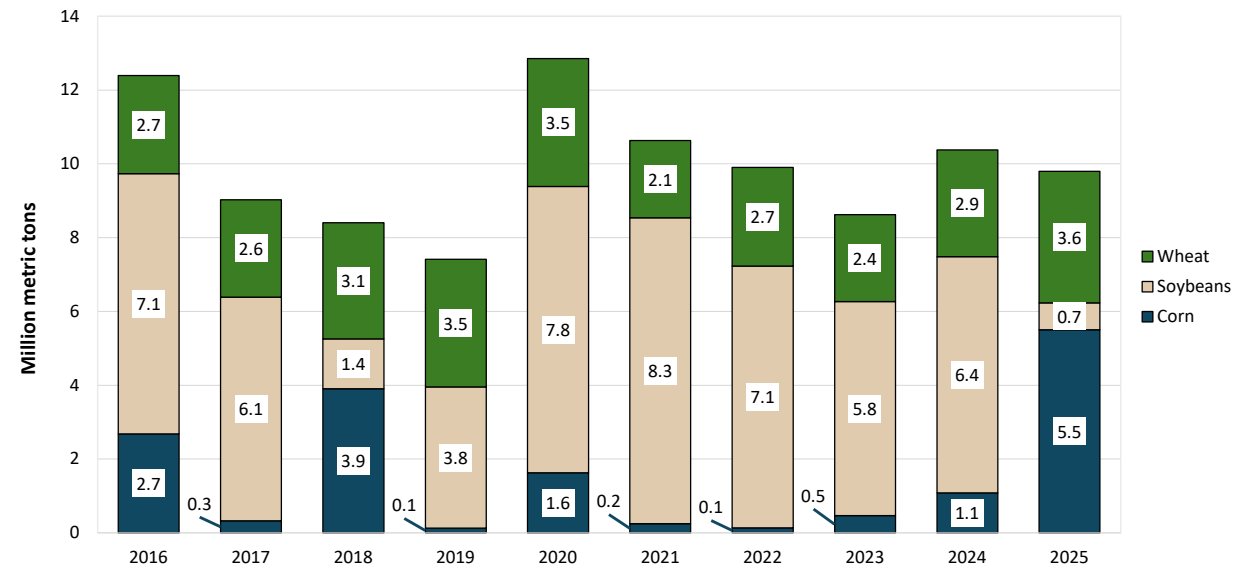
Looking Forward: China Returns to U.S. Soybean Market

At the beginning of November, the United States and China announced a [trade deal](#) that included China's agreement to buy U.S. soybeans—at least 12 mmt in the last 2 months of 2025 and at least 25 mmt per year in 2026, 2027, and 2028 ([GTR, November 20, 2025, fourth highlight](#)).

On November 29, the first soybean shipment—49,000 metric tons—to China in MY 2025/26 (and the first since May) shipped after the bulk carrier *Ocean Harvest* was inspected for export from the Mississippi Gulf. From November 30 to December 25, an additional 794,400 metric tons of soybeans were inspected for export to China, in 12 ships—10 out of the Mississippi Gulf and 2 out of the PNW.

Likely reflecting renewed demand for soybean shipments from the PNW, the secondary market for BNSF shuttle trips in January are about \$1,100 per car—well above December 2024 values for trips in January 2025 ([GTR table 5](#)).

Figure 1. September-November grain exports from Pacific Northwest, 2016-25



Source: USDA's Federal Grain Inspection Service.

If the Chinese soybean shipments continue in coming weeks and corn exports remain strong, logistics may become a more pressing issue for grain transportation. Regarding barge options, the Upper Mississippi River has closed for the season, and [ice on the Illinois River](#) may slow down grain originations ([GTR, December 18, 2025, first highlight](#)).

Regarding rail costs, strong shipping demand is already elevating secondary-market shuttle values. Severe winter weather events—such as those in [mid-](#) and [late-](#)December—could potentially slow the rail network and put additional pressure on freight costs.

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Grains are transported to the domestic and international markets via one or a combination 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.

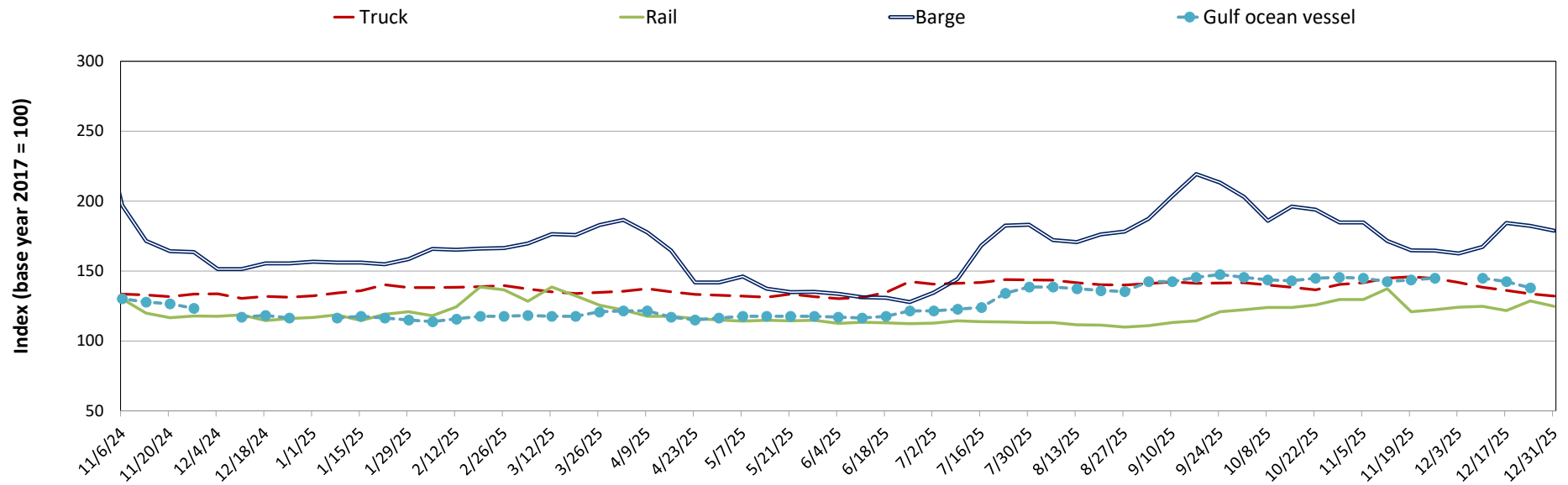
Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
12/31/25	132	125	179	n/a	n/a
12/24/25	134	129	182	138	133
01/01/25	132	117	157	n/a	n/a

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.

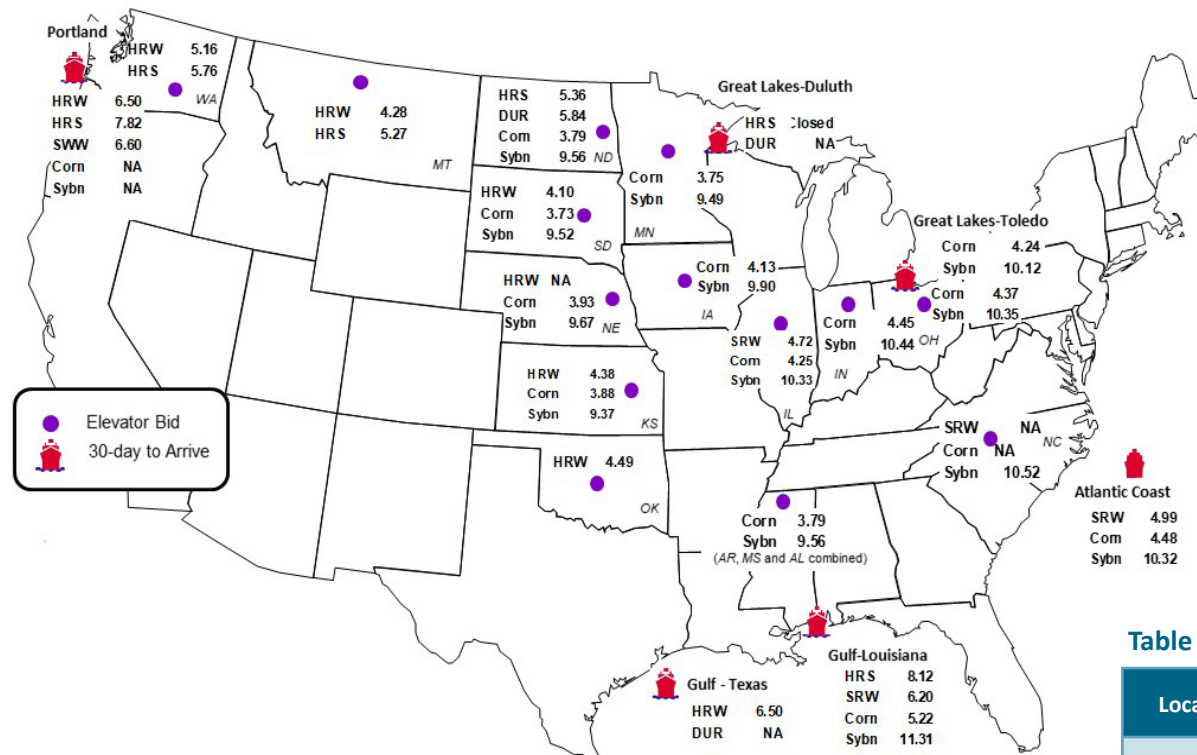
Figure 1. Grain transportation cost indicators as of week ending 12/31/25



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	12/26/2025	12/19/2025
Corn	IL-Gulf	-0.97	-1.01
Corn	NE-Gulf	-1.29	-1.31
Soybean	IA-Gulf	-1.41	-1.49
HRW	KS-Gulf	-2.12	-2.31
HRS	ND-Portland	-2.46	-2.47

Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.
 Source: USDA, Agricultural Marketing Service.

Table 2b. Futures

Location	Grain	Month	12/26/2025	Week ago 12/19/2025	Year ago 12/27/2024
Kansas City	Wheat	Mar	5.334	5.154	5.576
Minneapolis	Wheat	Mar	5.793	5.780	5.952
Chicago	Wheat	Mar	5.188	5.096	5.486
Chicago	Corn	Mar	4.498	4.438	4.554
Chicago	Soybean	Mar	10.724	10.596	9.930

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.

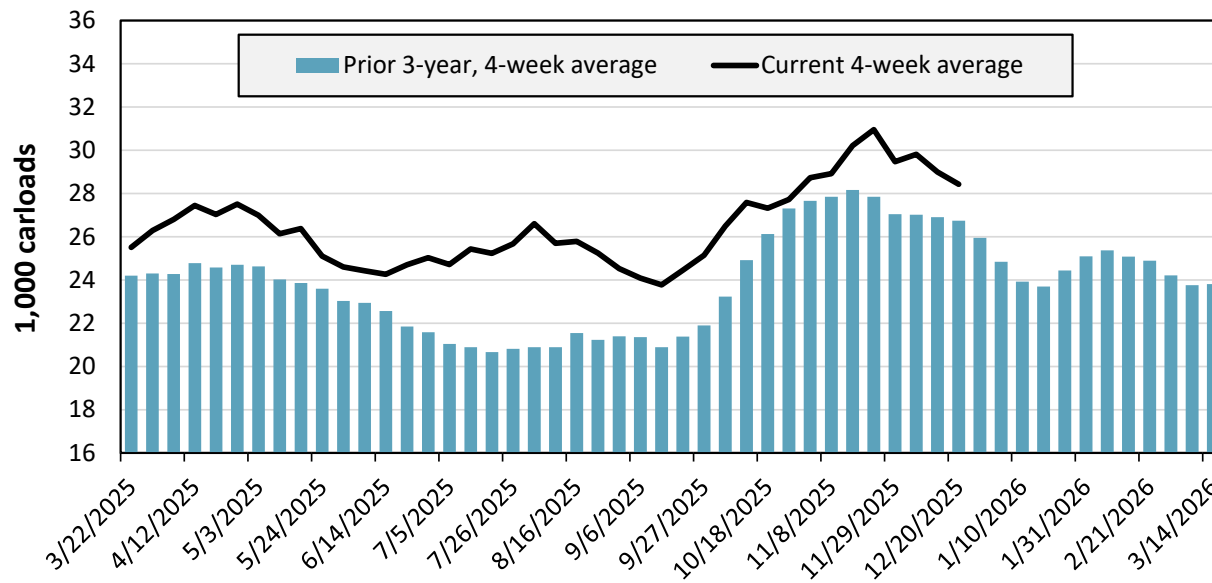
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 12/20/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,345	3,012	12,233	6,682	3,532	1,946	28,750
This week last year	1,857	2,877	10,557	6,641	3,236	1,536	26,704
2025 YTD	79,276	136,052	585,599	302,231	151,263	76,296	1,330,717
2024 YTD	86,679	140,415	548,171	273,597	139,853	57,452	1,246,167
2025 YTD as % of 2024 YTD	91	97	107	110	108	133	107
Last 4 weeks as % of 2024	85	85	117	99	121	121	108
Last 4 weeks as % of 3-yr. avg.	77	85	112	107	114	120	106
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 December 20, grain carloads were down 2 percent from the previous week, up 8 percent from last year, and up 6 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: 12/19/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	11.5	27.3	33.0	12.0	9.2	38.7	22.0
	Average over last 4 weeks	23.6	23.4	21.9	13.9	9.6	33.2	20.9
	Average of same 4 weeks last year	23.6	27.2	22.9	16.1	10.4	n/a	20.1
Average grain unit train speeds (miles per hour)	This week	23.7	18.6	24.3	23.1	24.1	18.6	22.1
	Average over last 4 weeks	23.6	19.6	25.0	23.3	24.6	18.4	22.4
	Average of same 4 weeks last year	22.7	20.2	25.3	22.7	25.0	n/a	23.2

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

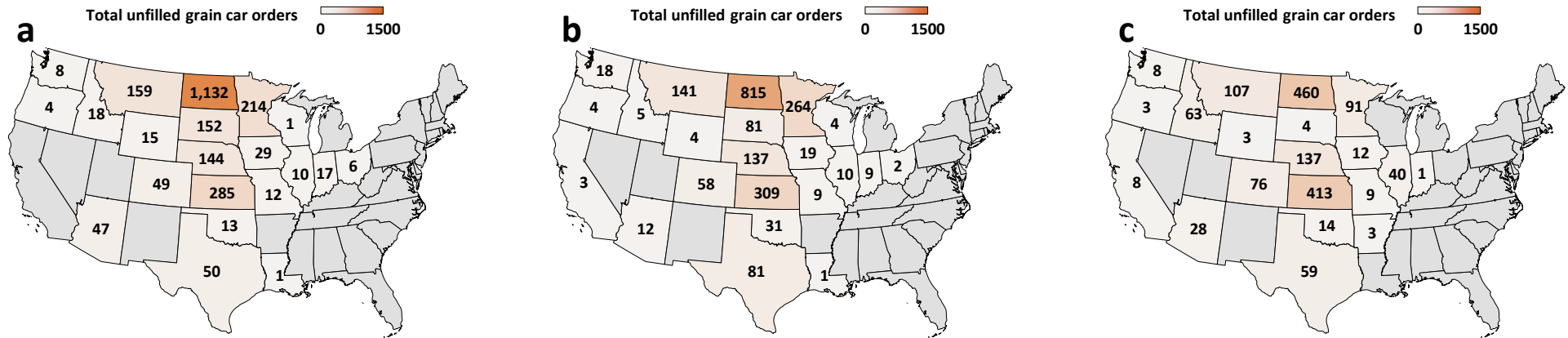
For the week ending: 12/19/2025		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	28	7	353	59	7	260	715
	Average over last 4 weeks	30	9	305	49	5	257	654
	Average of same 4 weeks last year	38	6	460	91	4	n/a	599
Average number of loaded grain cars not moved in over 48 hours	This week	30	233	892	45	18	622	1,841
	Average over last 4 weeks	16	161	574	63	14	697	1,523
	Average of same 4 weeks last year	47	203	528	76	2	n/a	855
Average number of grain unit trains held	This week	0	1	4	3	1	5	14
	Average over last 4 weeks	0	0	3	4	1	5	12
	Average of same 4 weeks last year	1	0	16	4	0	n/a	22
Total unfilled manifest grain car orders	This week	28	0	1,432	421	0	485	2,366
	Average over last 4 weeks	13	2	1,177	367	0	502	2,060
	Average of same 4 weeks last year	2	1	319	816	0	n/a	1,137

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](#).

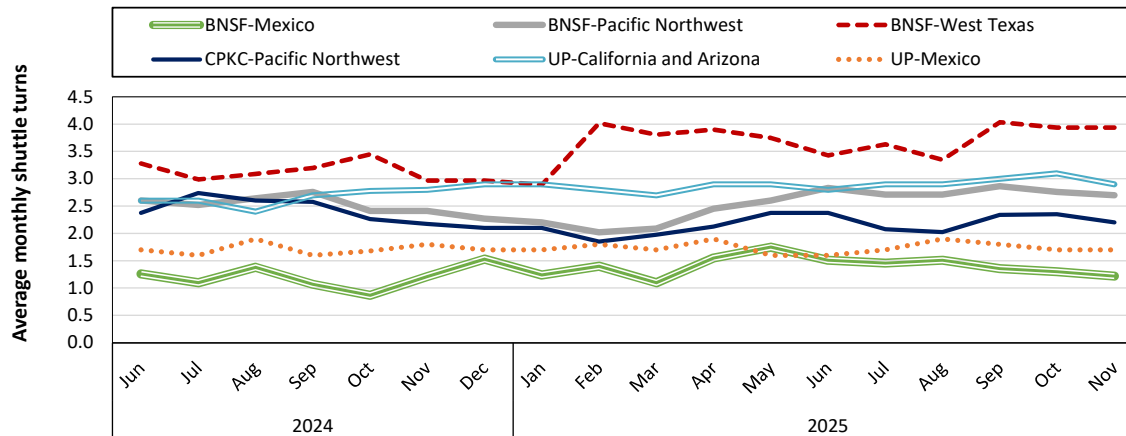
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 12/19/2025 (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

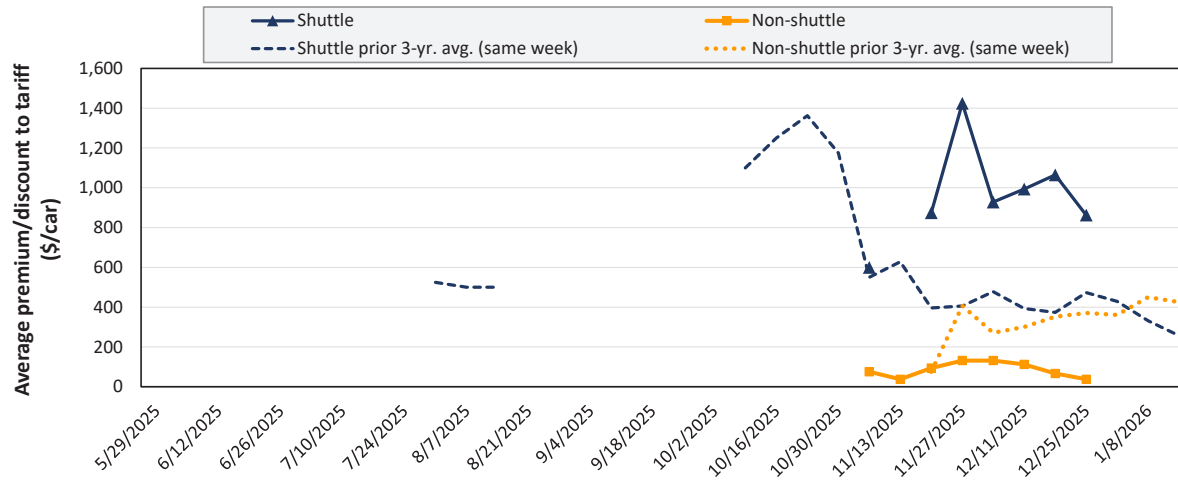


In November 2025, BNSF Railway's average monthly grain shuttle turns were 1.2 to Mexico, 2.7 to the Pacific Northwest, and 3.9 to West Texas. CPKC's shuttle turns averaged 2.2 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.7 to Mexico.

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

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



Average non-shuttle bids/offers fell \$29 this week, and are \$94 below the peak.

Average shuttle bids/offers fell \$202 this week and are \$563 below the peak.

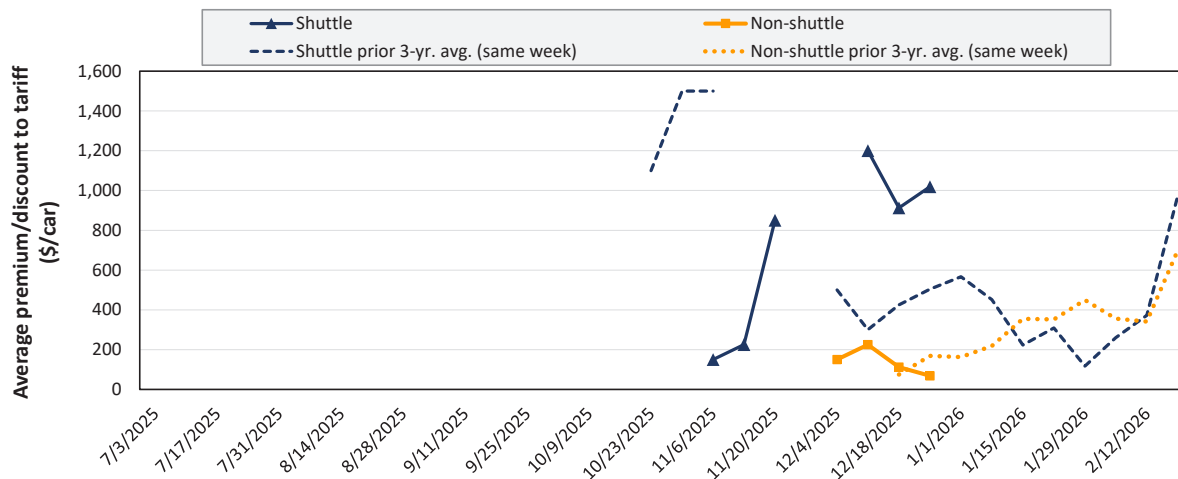
12/25/2025	BNSF	UP
Non-Shuttle	\$0	\$75
Shuttle	\$1,075	\$650

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 February 2026



Average non-shuttle bids/offers fell \$44 this week, and are \$156 below the peak.

Average shuttle bids/offers rose \$106 this week and are \$181 below the peak.

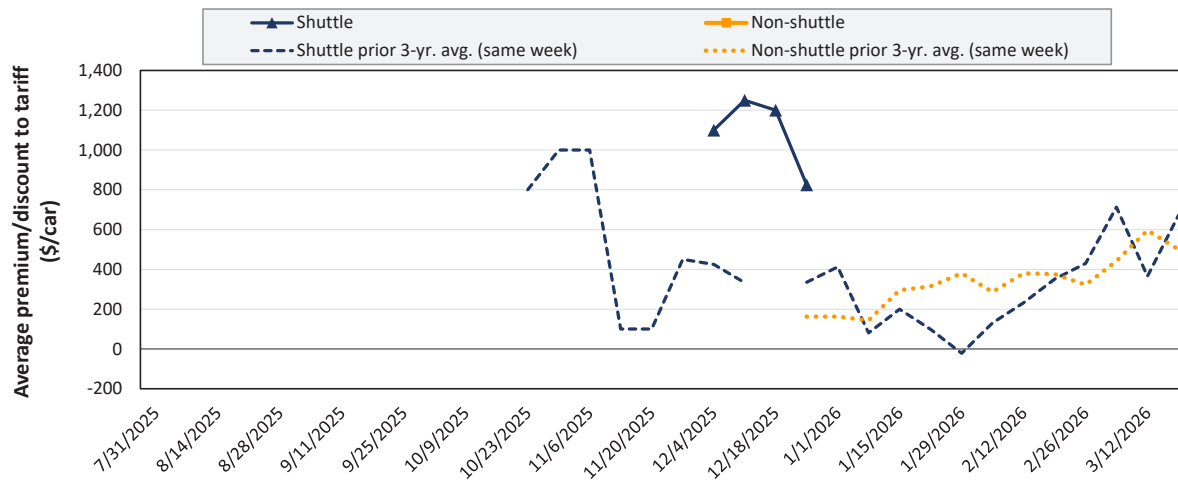
12/25/2025	BNSF	UP
Non-Shuttle	\$25	\$113
Shuttle	\$1,400	\$638

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 March 2026



There were no non-shuttle bids/offers this week.

Average shuttle bids/offers fell \$375 this week and are \$425 below the peak.

	12/25/2025	BNSF	UP
Non-Shuttle		n/a	n/a
Shuttle		\$1,150	\$500

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: 12/25/2025		Delivery period					
		Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26
Non-shuttle	BNSF	n/a	0	25	n/a	n/a	n/a
	Change from last week	n/a	17	-25	n/a	n/a	n/a
	Change from same week 2024	n/a	-167	-225	n/a	n/a	n/a
	UP	n/a	75	113	n/a	n/a	n/a
	Change from last week	n/a	-75	-63	n/a	n/a	n/a
	Change from same week 2024	n/a	25	13	n/a	n/a	n/a
Shuttle	BNSF	300	1,075	1,400	1,150	550	n/a
	Change from last week	-250	-363	200	-50	0	n/a
	Change from same week 2024	400	738	913	813	n/a	n/a
	UP	500	650	638	500	n/a	n/a
	Change from last week	275	-42	13	n/a	n/a	n/a
	Change from same week 2024	775	775	n/a	n/a	n/a	n/a
	CPKC	50	50	n/a	n/a	n/a	n/a
	Change from last week	n/a	-117	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	0	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, January 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	\$5,832	\$142.44	\$5,974.44	\$1.61	\$59.33	4.5
	BNSF	Williston, ND	Superior, WI	Shuttle	\$4,291	\$73.32	\$4,364.32	\$1.18	\$43.34	5.6
	CPKC	Westby, MT	St. Louis, MO	Unit	\$5,788	\$464.49	\$6,252.49	\$1.69	\$62.09	4.1
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	\$4,804	\$85.32	\$4,889.32	\$1.32	\$48.55	5.1
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	\$6,215	\$180.12	\$6,395.12	\$1.73	\$63.51	4.5
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	\$2,865	\$35.28	\$2,900.28	\$0.78	\$28.80	8.0
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	\$5,732	\$183.48	\$5,915.48	\$1.60	\$58.74	6.8
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	\$5,838	\$152.04	\$5,990.04	\$1.62	\$59.48	4.6
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	\$5,412	\$124.56	\$5,536.56	\$1.50	\$54.98	4.8
	CPKC	Minot, ND	Kalama, WA	Unit	\$5,298	\$411.26	\$5,709.26	\$1.54	\$56.70	-2.7
	CPKC	Nekoma, ND	Chicago, IL	Manifest	\$5,030	\$247.16	\$5,277.16	\$1.43	\$52.40	4.5
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	\$3,400	\$76.56	\$3,476.56	\$0.94	\$34.52	-10.7
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	\$3,600	\$67.56	\$3,667.56	\$0.99	\$36.42	-13.4
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	\$5,800	\$228.00	\$6,028.00	\$1.63	\$59.86	-11.7
	BNSF	Garden City, KS	San Bernardino, CA	DET	\$5,700	\$165.12	\$5,865.12	\$1.59	\$58.24	0.7
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,200	\$103.08	\$4,303.08	\$1.16	\$42.73	-11.1
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,000	\$90.84	\$4,090.84	\$1.11	\$40.62	-12.2
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	\$3,500	\$103.68	\$3,603.68	\$0.97	\$35.79	-13.2
	BNSF	Wichita, KS	Chicago, IL	DET	\$3,700	\$75.96	\$3,775.96	\$1.02	\$37.50	-11.4
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	\$3,900	\$76.56	\$3,976.56	\$1.07	\$39.49	-10.8
	UP	Byers, CO	Houston, TX	Shuttle	\$4,525	\$407.05	\$4,932.05	\$1.33	\$48.98	-6.3
	UP	Goodland, KS	Kansas City, MO	Manifest	\$4,967	\$152.25	\$5,119.25	\$1.38	\$50.84	2.3
	UP	Medford, OK	Houston, TX	Shuttle	\$3,775	\$200.90	\$3,975.90	\$1.07	\$39.48	-8.4
	UP	Salina, KS	Houston, TX	Shuttle	\$4,025	\$267.75	\$4,292.75	\$1.16	\$42.63	-7.6
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	\$4,791	\$92.64	\$4,883.64	\$1.32	\$48.50	5.1
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	\$4,439	\$90.96	\$4,529.96	\$1.22	\$44.98	5.5
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	\$2,032	\$39.96	\$2,071.96	\$0.56	\$20.58	0.8
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	\$8,611	\$0.00	\$8,611.00	\$2.33	\$85.51	3.2
	CSX	Chicago, IL	Albany, NY	Unit	\$7,676	\$0.00	\$7,676.00	\$2.07	\$76.23	3.5
	CSX	Chicago, IL	Buffalo, NY	Manifest	\$6,102	\$0.00	\$6,102.00	\$1.65	\$60.60	3.0
	CSX	Chicago, IL	Indiantown, FL	Manifest	\$8,832	\$0.00	\$8,832.00	\$2.39	\$87.71	3.1

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

Source: BNSF, CPKC, CSX, and UP.

Table 7. Rail tariff rates for corn and soybean unit/shuttle train shipments, January 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	\$5,600	\$127.92	\$5,727.92	\$1.44	\$56.88	-2.5
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	\$5,470	\$202.08	\$5,672.08	\$1.43	\$56.33	1.5
	BNSF	Edison, NE	Hanford, CA	Railroad	\$5,460	\$213.12	\$5,673.12	\$1.43	\$56.34	-7.4
	BNSF	Edison, NE	Hereford, TX	Railroad	\$4,500	\$87.36	\$4,587.36	\$1.16	\$45.55	-9.9
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	\$5,350	\$211.08	\$5,561.08	\$1.40	\$55.22	1.6
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	\$4,620	\$112.20	\$4,732.20	\$1.19	\$46.99	2.3
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	\$4,260	\$91.68	\$4,351.68	\$1.10	\$43.21	-10.3
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	\$4,000	\$112.44	\$4,112.44	\$1.04	\$40.84	-10.7
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	\$5,430	\$170.28	\$5,600.28	\$1.41	\$55.61	1.3
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	\$5,430	\$199.92	\$5,629.92	\$1.42	\$55.91	1.5
	CN	Gibson City, IL	Reserve, LA	Private	\$2,301	\$344.52	\$2,645.52	\$0.67	\$26.27	7.2
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,681	\$344.52	\$3,025.52	\$0.76	\$30.04	6.2
	CPKC	Delhi, LA	Morton, MS	Railroad	\$1,342	\$51.60	\$1,393.60	\$0.35	\$13.84	0.7
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,047	\$472.97	\$5,519.97	\$1.39	\$54.82	0.9
	CPKC	Glenwood, MN	Boardman, OR	Railroad	\$5,513	\$455.13	\$5,968.13	\$1.51	\$59.27	0.8
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	\$6,241	\$0.00	\$6,241.00	\$1.57	\$61.98	4.7
	CSX	Marysville, OH	Rose Hill, NC	Railroad	\$6,378	\$0.00	\$6,378.00	\$1.61	\$63.34	3.9
	CSX	Olney, IL	Fairmount, GA	Railroad	\$4,891	\$0.00	\$4,891.00	\$1.23	\$48.57	3.9
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	\$3,935	\$241.85	\$4,176.85	\$1.05	\$41.48	-2.5
	UP	Frankfort, KS	Calipatria, CA	Railroad	\$5,855	\$550.20	\$6,405.20	\$1.62	\$63.61	-0.9
Soybeans	UP	Mead, NE	Keyes, CA	Railroad	\$6,015	\$607.95	\$6,622.95	\$1.67	\$65.77	-0.7
	UP	Nebraska City, NE	Amarillo, TX	Railroad	\$4,855	\$249.90	\$5,104.90	\$1.29	\$50.69	-2.1
	UP	Sloan, IA	Burley, ID	Railroad	\$5,535	\$411.60	\$5,946.60	\$1.50	\$59.05	-1.3
	UP	Sterling, IL	Nashville, AR	Railroad	\$4,075	\$253.05	\$4,328.05	\$1.09	\$42.98	-2.4
	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	\$6,135	\$183.36	\$6,318.36	\$1.71	\$62.74	1.2
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	\$5,185	\$196.08	\$5,381.08	\$1.45	\$53.44	-20.9
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	\$6,085	\$176.28	\$6,261.28	\$1.69	\$62.18	1.2
	BNSF	Casselton, ND	St. Louis, MO	Railroad	\$3,400	\$102.60	\$3,502.60	\$0.95	\$34.78	-22.9
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	\$6,185	\$194.88	\$6,379.88	\$1.72	\$63.36	1.3
	CN	Gibson City, IL	Reserve, LA	Private	\$2,301	\$344.52	\$2,645.52	\$0.72	\$26.27	7.2
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,681	\$344.52	\$3,025.52	\$0.82	\$30.04	6.2
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,785	\$472.97	\$6,257.97	\$1.69	\$62.14	0.8
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	\$3,526	\$361.50	\$3,887.50	\$1.05	\$38.60	1.0
	CSX	Casey, IL	Mobile, AL	Private	\$3,646	\$0.00	\$3,646.00	\$0.99	\$36.21	0.0
	CSX	Marion, OH	Chesapeake, VA	Private	\$3,214	\$0.00	\$3,214.00	\$0.87	\$31.92	0.0
	UP	Canton, KS	Houston, TX	Railroad	\$3,650	\$261.45	\$3,911.45	\$1.06	\$38.84	-27.1
	UP	Cozad, NE	Kalama, WA	Railroad	\$5,140	\$546.70	\$5,686.70	\$1.54	\$56.47	-13.7
	UP	Cozad, NE	Houston, TX	Railroad	\$4,010	\$377.30	\$4,387.30	\$1.19	\$43.57	-24.7
	UP	Sloan, IA	Ama, LA	Railroad	\$4,090	\$430.85	\$4,520.85	\$1.22	\$44.89	-24.0

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, CN, CPKC, CSX, and UP.

Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, January 2026

Commodity	US origin	US border city	US railroad	Train type	US Tariff Rate per car (USD)	US Fuel Surcharge per car (USD)	US Rate Plus Fuel Surcharge per car (USD)	US Tariff Rate + Fuel Surcharge per bushel (USD)	US Tariff Rate + Fuel Surcharge per metric ton (USD)	Percent Y/Y
Corn	Adair, IL	El Paso, TX	BNSF	Shuttle	\$4,641	\$154	\$4,795	\$1.20	\$47.19	3.1%
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	\$5,080	\$553	\$5,633	\$1.41	\$55.44	1.9%
	Council Bluffs, IA	Laredo, TX	CPKC	Non-shuttle	\$5,550	\$611	\$6,161	\$1.54	\$60.64	1.9%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,005	\$528	\$5,533	\$1.38	\$54.46	1.8%
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	\$5,190	\$560	\$5,750	\$1.44	\$56.59	1.8%
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	\$4,535	\$447	\$4,982	\$1.25	\$49.03	-1.4%
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	\$4,655	\$464	\$5,119	\$1.28	\$50.38	-1.4%
Soybeans	Superior, NE	El Paso, TX	BNSF	Shuttle	\$4,622	\$121	\$4,743	\$1.19	\$46.68	-6.5%
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	\$5,080	\$553	\$5,633	\$1.51	\$55.44	1.9%
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	\$4,325	\$131	\$4,456	\$1.19	\$43.86	-17.5%
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	\$4,950	\$425	\$5,375	\$1.44	\$52.90	-18.6%
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	\$4,325	\$130	\$4,455	\$1.19	\$43.85	-17.5%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,005	\$528	\$5,533	\$1.48	\$54.46	1.8%
Wheat	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	\$5,035	\$446	\$5,481	\$1.47	\$53.94	-18.2%
	FT Worth, TX	El Paso, TX	BNSF	DET	\$3,000	\$94	\$3,094	\$0.83	\$30.45	-24.4%
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	\$2,800	\$94	\$2,894	\$0.78	\$28.48	-20.8%
	Great Bend, KS	Laredo, TX	UP	Shuttle	\$4,099	\$319	\$4,418	\$1.18	\$43.48	-7.7%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,005	\$528	\$5,533	\$1.48	\$54.46	1.8%
	Wichita, KS	Laredo, TX	UP	Shuttle	\$4,024	\$281	\$4,305	\$1.15	\$42.37	-6.0%

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).

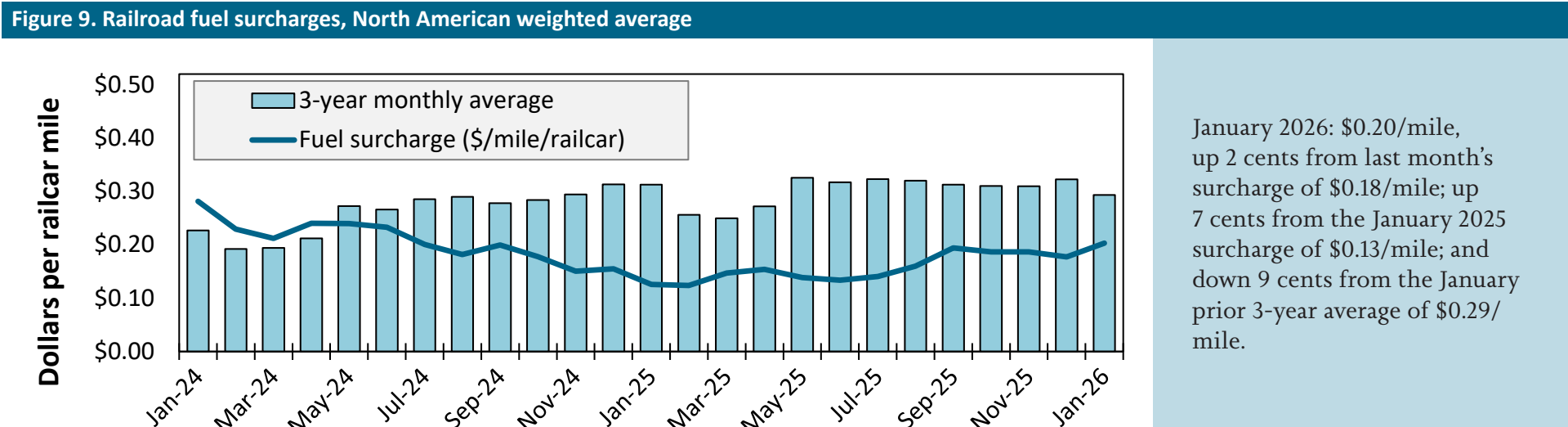
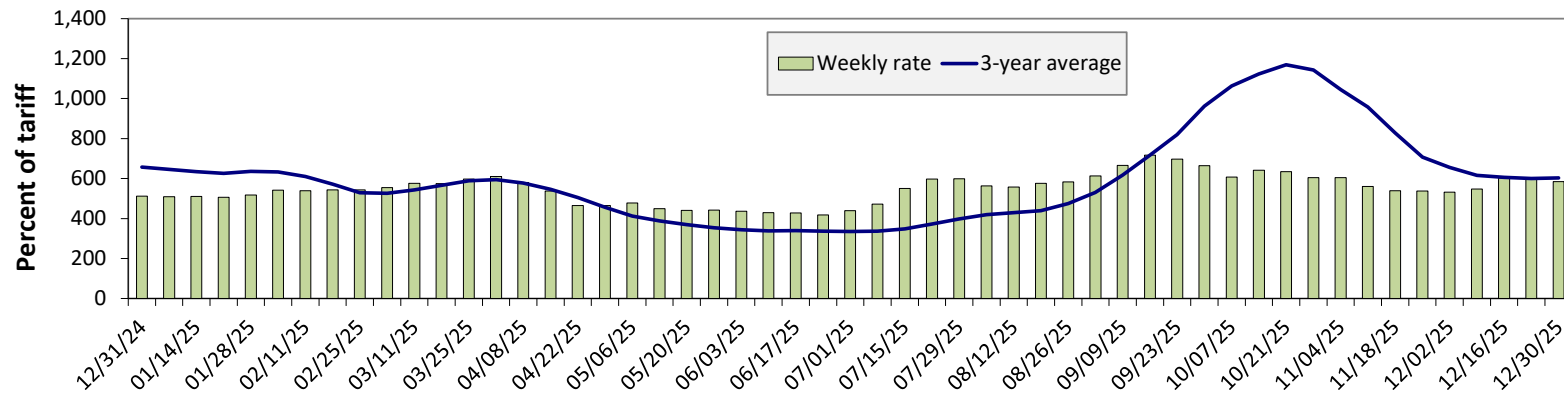


Figure 10. Illinois River barge freight rate



For the week ending December 30: 2 percent lower than the previous week; 14 percent higher than last year; and 3 percent lower 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	12/30/2025	n/a	n/a	585	500	497	406
	12/23/2025	n/a	n/a	596	498	491	401
\$/ton	12/30/2025	n/a	n/a	27.14	19.95	23.31	12.75
	12/23/2025	n/a	n/a	27.65	19.87	23.03	12.59
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	n/a	n/a	14	30	21	33
	3-year avg.	n/a	n/a	-3	-2	-3	0
Rate	January	n/a	n/a	579	473	473	394
	March	n/a	566	523	430	426	357

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](#).

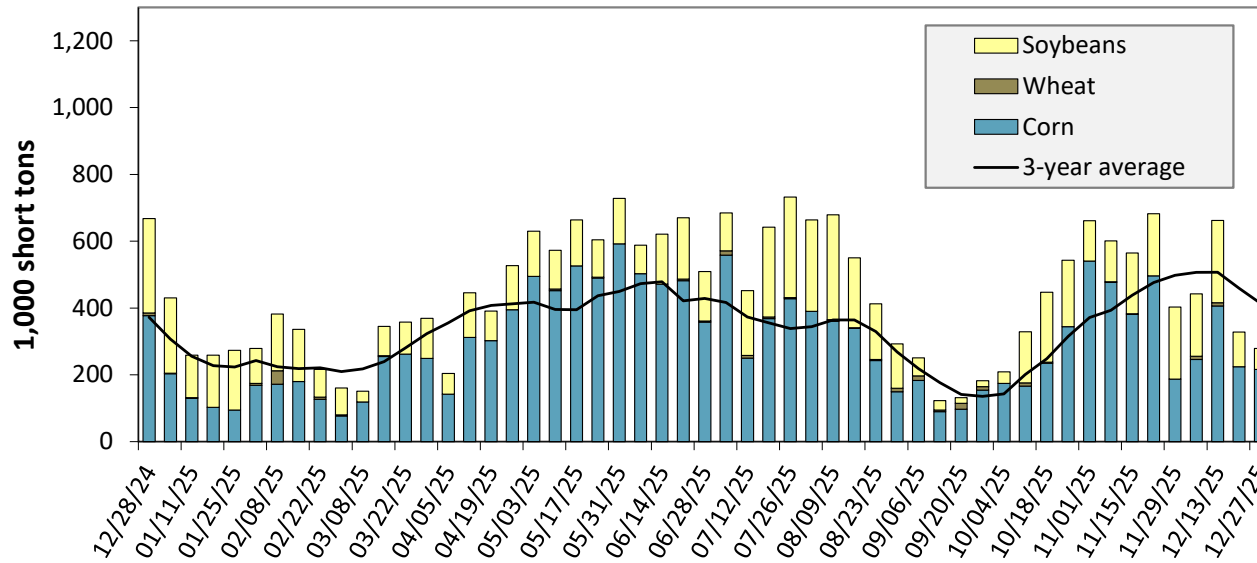
Source: USDA, Agricultural Marketing Service.

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 December 27: 58 percent lower than last year and 33 percent lower than the 3-year average.

Note: The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers.

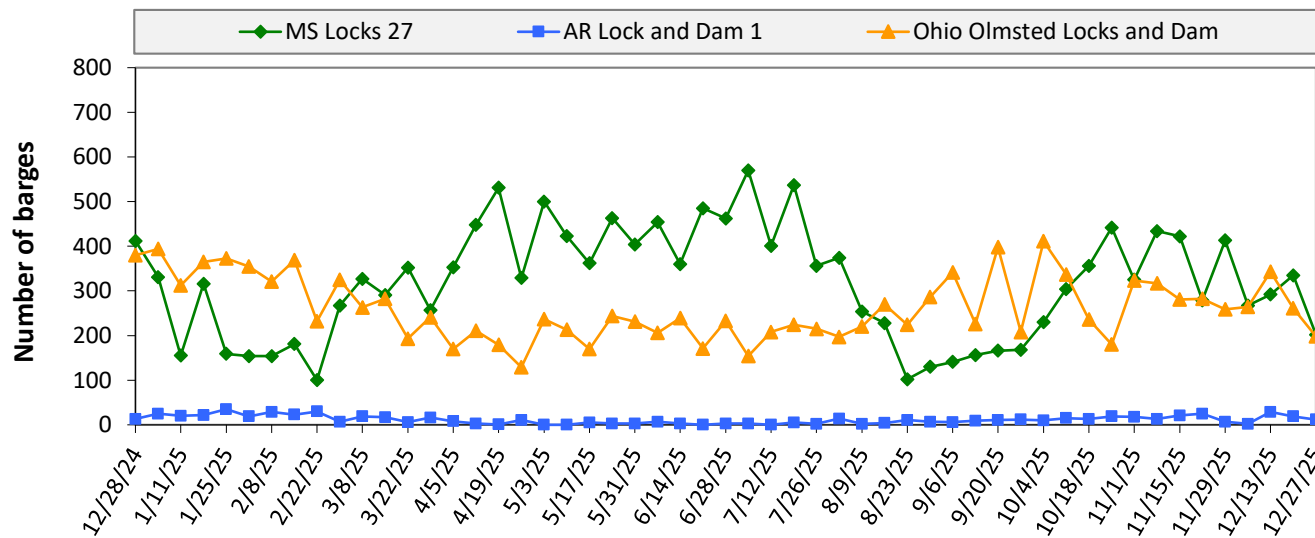
Table 10. Barged grain movements (1,000 tons)

For the week ending 12/27/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	0	0	0	0	0
Mississippi River (Winfield, MO (L25))	93	0	22	0	115
Mississippi River (Alton, IL (L26))	206	0	62	0	268
Mississippi River (Granite City, IL (L27))	216	0	63	0	279
Illinois River (La Grange)	168	0	72	0	241
Ohio River (Olmsted)	34	2	55	0	90
Arkansas River (L1)	0	3	32	0	35
Weekly total - 2025	250	4	150	0	404
Weekly total - 2024	500	20	410	15	945
2025 YTD	19,552	1,247	11,039	166	32,003
2024 YTD	15,251	1,564	12,598	214	29,626
2025 as % of 2024 YTD	128	80	88	77	108
Last 4 weeks as % of 2024	81	79	58	37	70
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.

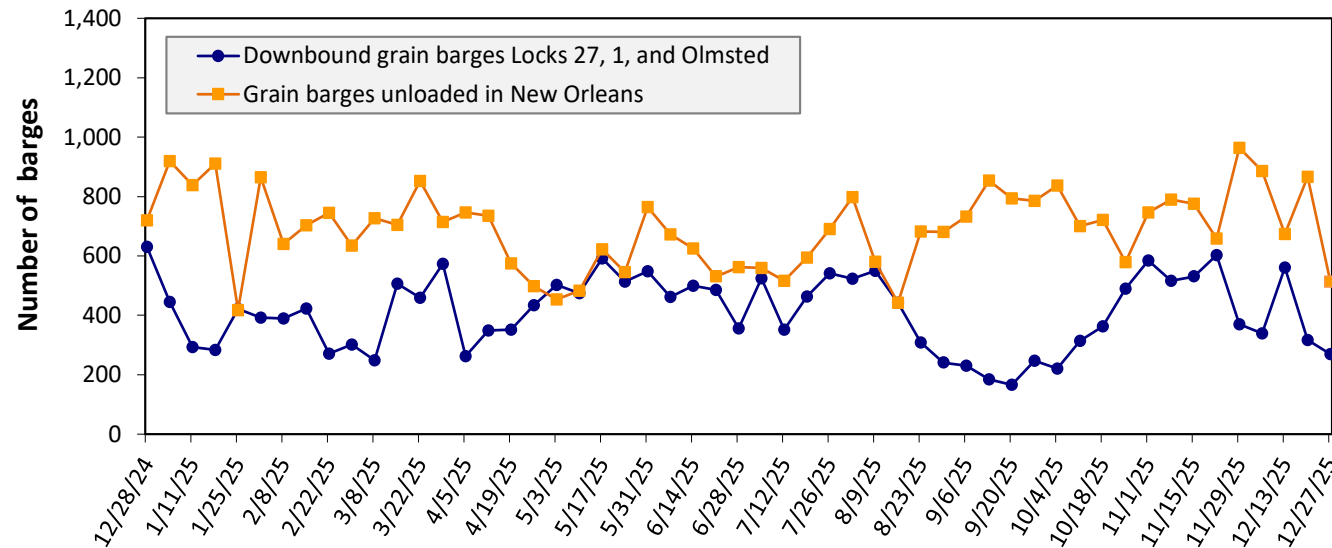
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending December 27: 412 barges transited the locks, 203 barges fewer than the previous week, and 39 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 December 27: 270 barges moved down river, 47 fewer than the previous week; 513 grain barges unloaded in the New Orleans Region, 41 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	
		December 2025	November 2025	December 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$22.79	\$23.01	\$21.58	5.6	4.4
	Central Ferry, WA/Almota, WA	\$21.86	\$22.08	\$20.68	5.7	4.2
	Lyons Ferry, WA	\$20.81	\$21.03	\$19.67	5.8	4.0
	Windust, WA/Lower Monumental, WA	\$19.74	\$19.96	\$18.64	5.9	3.8
	Sheffler, WA	\$19.71	\$19.93	\$18.61	5.9	3.8
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$18.47	\$18.69	\$17.41	6.1	3.5
	Port Kelly, WA/Wallula, WA	\$18.24	\$18.46	\$17.19	6.1	3.4
	Umatilla, OR	\$18.14	\$18.36	\$17.09	6.1	3.4
	Boardman, OR/Hogue Warner, OR	\$17.87	\$18.09	\$16.83	6.2	3.3
	Arlington, OR/Roosevelt, WA	\$17.71	\$17.93	\$16.67	6.2	3.3
	Biggs, OR	\$16.33	\$16.55	\$15.34	6.4	2.9
	The Dalles, OR	\$15.19	\$15.41	\$14.24	6.7	2.5

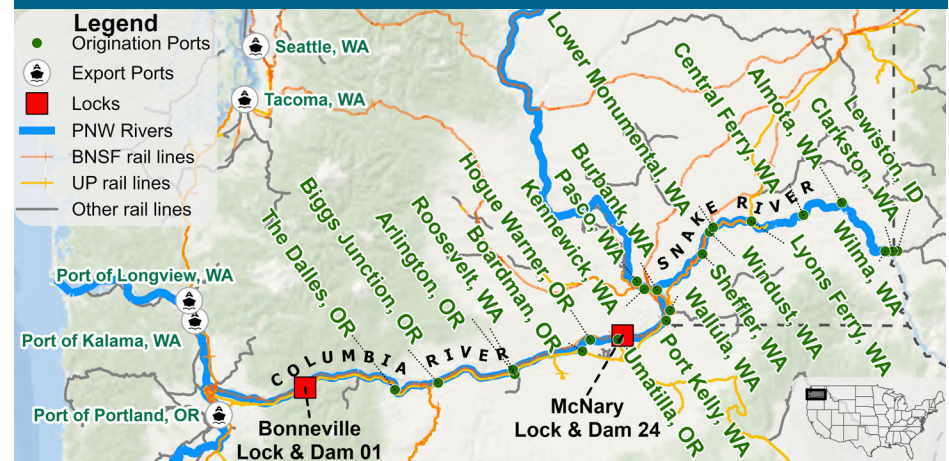
Note: Destination is Portland, OR, or Vancouver, WA; ton = 2,000 pounds; n/a = data not available.
Source: USDA, Agricultural Marketing Service.

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

November, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	363	0	363
Columbia River (Bonneville Lock and Dam (L1))	450	0	450
Monthly total 2025	450	0	450
Monthly total 2024	338	0	338
2025 YTD	3,869	0	3,869
2024 YTD	3,258	0	3,258

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.

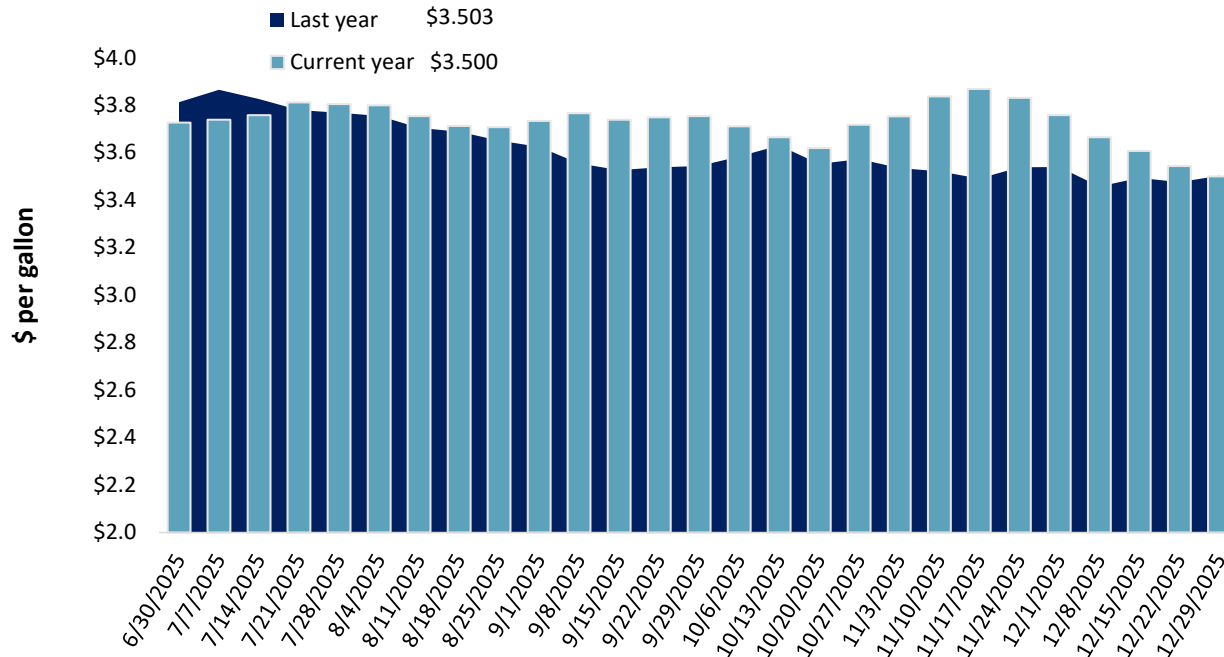
Table 13. Retail on-highway diesel prices, week ending 12/29/2025 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.645	-0.029	0.058
	New England	4.035	-0.012	0.282
	Central Atlantic	3.875	-0.017	0.101
	Lower Atlantic	3.522	-0.035	0.021
II	Midwest	3.424	-0.059	-0.045
III	Gulf Coast	3.184	-0.030	-0.012
IV	Rocky Mountain	3.233	-0.071	-0.137
V	West Coast	4.156	-0.049	0.046
	West Coast less California	3.719	-0.047	0.014
	California	4.660	-0.051	0.084
Total	United States	3.500	-0.044	-0.003

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 December 29, the U.S. average diesel fuel price decreased 4.4 cents from the previous week to \$3.50 per gallon, 0.3 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 12/18/2025	1,713	837	1,373	1,372	143	5,437	25,163	12,506	43,106
	This week year ago	1,192	851	1,657	1,368	130	5,198	23,279	12,940	41,417
	Last 4 wks. as % of same period 2024/25	145	104	86	121	119	112	106	88	101
Current shipped (cumulative) exports sales	2025/26 YTD	5,594	1,956	3,647	3,012	256	14,465	24,618	14,327	53,410
	2024/25YTD	2,758	1,723	3,812	3,087	186	11,566	14,745	26,607	52,918
	YTD 2025/26 as % of 2024/25	203	114	96	98	137	125	167	54	101
	Total 2024/25	5,377	3,106	6,560	5,730	335	21,107	69,081	50,106	140,295
	Total 2023/24	3,535	4,260	6,314	3,906	526	18,540	54,277	44,510	117,328

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 12/18/2025	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	16,994	14,901	14	19,839
Japan	7,171	4,896	46	10,478
Colombia	3,772	3,487	8	5,493
China	0	26	-100	3,461
Korea	4,317	1,151	275	3,127
Top 5 importers	27,937	23,311	20	39,272
Total U.S. corn export sales	49,781	38,024	31	54,276
% of YTD current month's export projection	61%	52%	-	-
Change from prior week	2,202	1,711	-	-
Top 5 importers' share of U.S. corn export sales	56%	61%	-	72%
USDA forecast December 2025	81,284	72,597	12	-
Corn use for ethanol USDA forecast, December 2025	142,240	138,075	3	-

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2024/25 (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 12/18/2025	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		
China	6,026	18,247	-67	26,078
Mexico	3,467	3,165	10	4,762
Japan	1,122	1,059	6	2,107
Egypt	2,169	1,703	27	2,098
Indonesia	947	789	20	1,997
Top 5 importers	13,731	24,963	-45	37,042
Total U.S. soybean export sales	26,833	39,547	-32	48,941
% of YTD current month's export projection	60%	77%	-	-
Change from prior week	1,056	978	-	-
Top 5 importers' share of U.S. soybean export sales	51%	63%	-	76%
USDA forecast, December 2025	44,497	51,220	-13	-

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2024/25 (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 12/18/2025	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	3,359	3,151	7	3,358
Philippines	2,187	2,161	1	2,473
Japan	1,666	1,665	0	2,045
China	259	139	86	1,137
Korea	1,522	1,721	-12	1,674
Taiwan	783	730	7	935
Thailand	515	739	-30	667
Nigeria	1,220	344	254	629
Indonesia	942	639	47	518
Colombia	547	329	66	489
Top 10 importers	13,000	11,618	12	13,926
Total U.S. wheat export sales	19,902	16,764	19	19,135
% of YTD current month's export projection	81%	75%	-	-
Change from prior week	148	612	-	-
Top 10 importers' share of U.S. wheat export sales	65%	69%	-	73%
USDA forecast, December 2025	24,494	22,480	9	-

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)

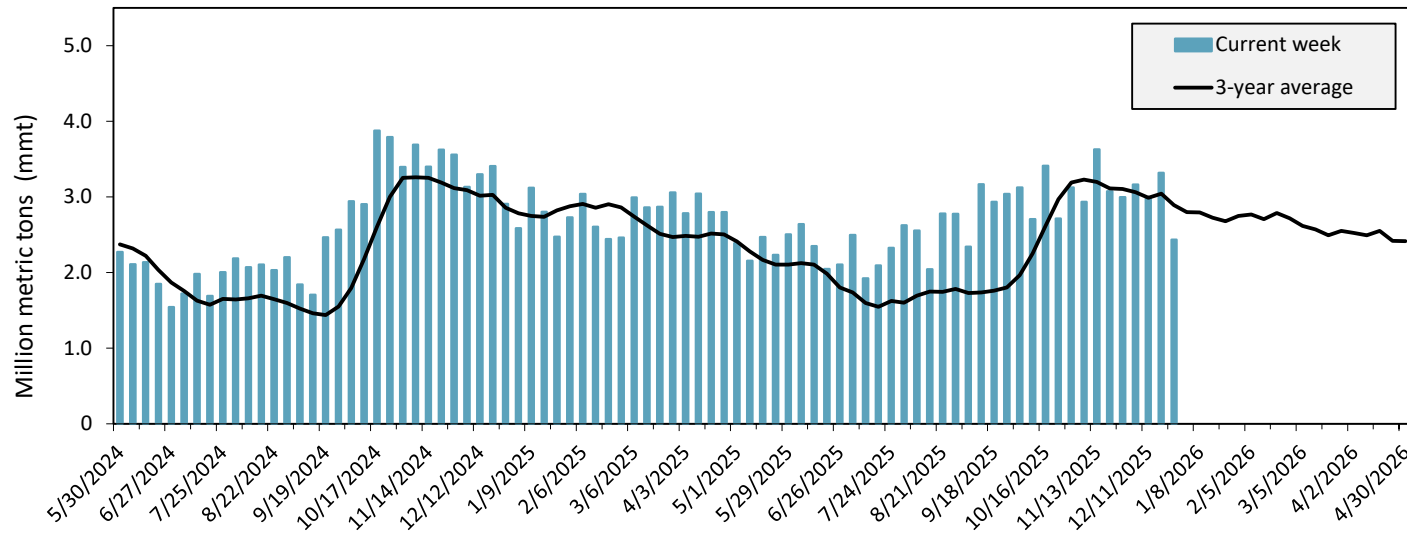
Port regions	Commodity	For the week ending 12/25/2025	Previous week*	Current week as % of previous	2025 YTD*	2024 YTD*	2025 YTD as % of 2024 YTD	Last 4-weeks as % of:		2024 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	405	625	65	23,622	13,764	172	200	271	13,987
	Soybeans	67	59	114	2,823	10,238	28	14	14	10,445
	Wheat	215	354	61	12,171	11,276	108	156	159	11,453
	All grain	687	1,037	66	38,820	36,578	106	106	114	37,186
Mississippi Gulf	Corn	620	752	82	36,738	26,911	137	129	151	27,407
	Soybeans	510	659	77	22,714	29,116	78	54	61	29,741
	Wheat	50	64	78	3,959	4,502	88	139	172	4,523
	All grain	1,180	1,475	80	63,451	60,647	105	80	92	61,789
Texas Gulf	Corn	0	0	n/a	590	566	104	99	55	570
	Soybeans	0	0	n/a	1,374	741	185	83	145	741
	Wheat	0	96	0	4,657	1,795	259	198	194	1,940
	All grain	57	96	60	7,569	6,816	111	114	88	6,965
Interior	Corn	231	335	69	15,228	13,271	115	158	153	13,463
	Soybeans	134	192	70	7,570	7,950	95	84	98	8,059
	Wheat	8	51	16	3,026	2,933	103	96	107	2,989
	All grain	396	583	68	26,345	24,431	108	118	126	24,791
Great Lakes	Corn	40	20	206	414	251	165	211	538	271
	Soybeans	0	0	n/a	63	136	46	2	1	136
	Wheat	29	71	40	434	633	69	99	90	653
	All grain	69	91	76	911	1,020	89	118	113	1,060
Atlantic	Corn	5	16	29	602	405	149	189	203	410
	Soybeans	39	20	197	1,020	1,210	84	69	68	1,272
	Wheat	0	0	n/a	81	73	112	n/a	n/a	73
	All grain	43	36	121	1,704	1,688	101	78	79	1,754
All Regions	Corn	1,301	1,747	74	77,196	55,167	140	155	181	56,109
	Soybeans	750	929	81	35,816	49,862	72	51	56	50,865
	Wheat	302	636	48	24,329	21,211	115	143	148	21,631
	All grain	2,434	3,318	73	139,052	131,650	106	94	103	134,016

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

Source: USDA, Federal Grain Inspection Service.

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

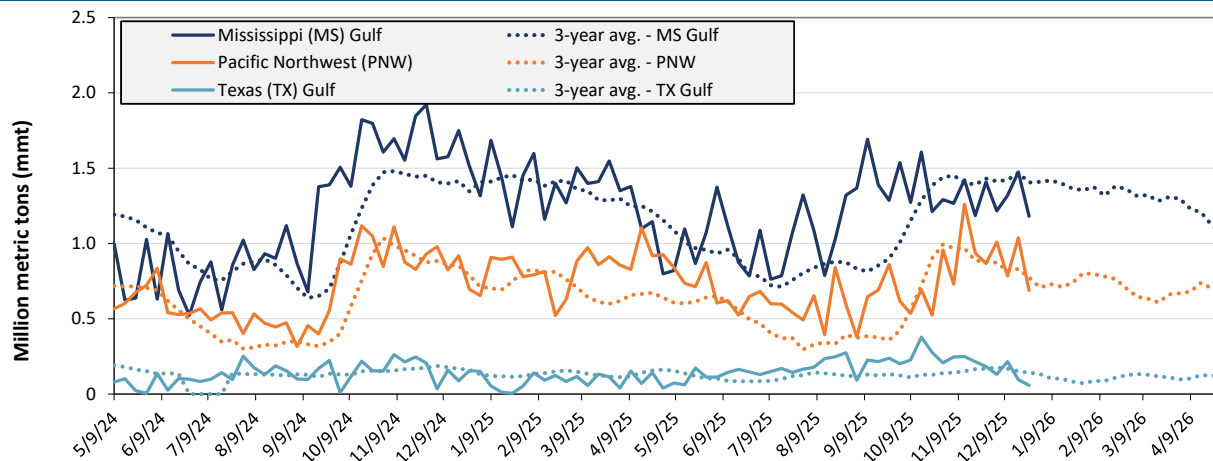
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending December 25: 2.4 mmt of grain inspected, down 27 percent from the previous week, down 27 percent from the same week last year, and down 16 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 12/25/25 inspections (mmt):

MS Gulf: 1.18

PNW: 0.69

TX Gulf: 0.06

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 20	down 40	down 21	down 34
Last year (same 7 days)	down 32	down 64	down 35	down 21
3-year average (4-week moving average)	down 16	down 59	down 20	down 11

Source: USDA, Federal Grain Inspection Service.

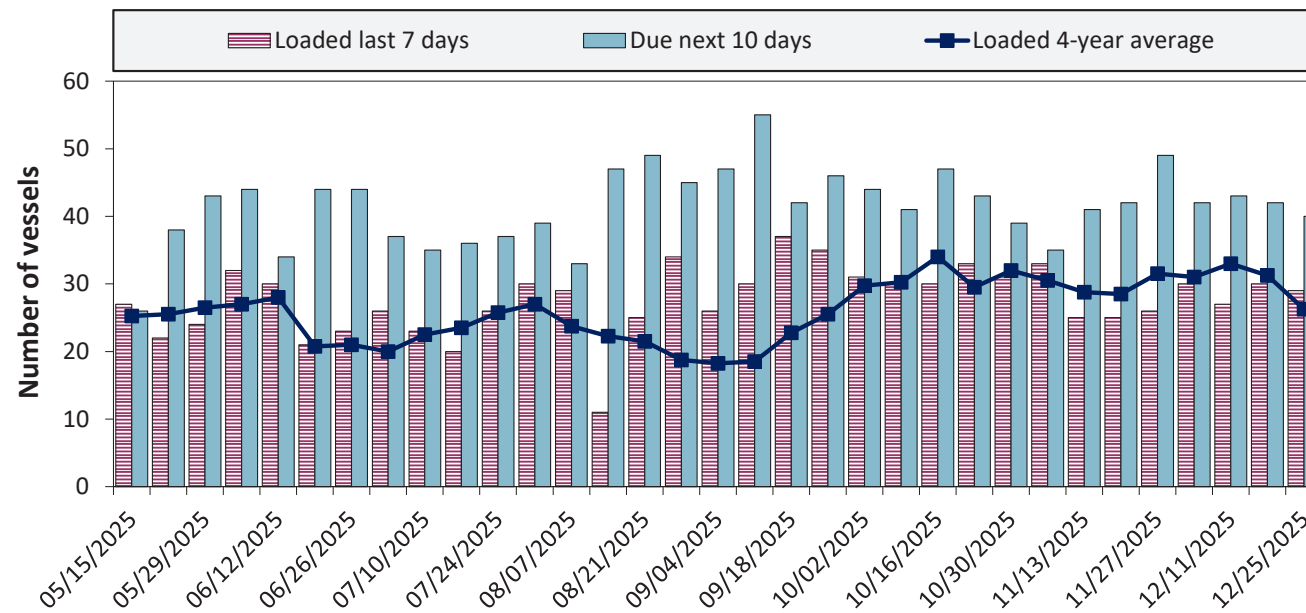
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
12/25/2025	32	29	40	n/a
12/18/2025	29	30	42	12
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

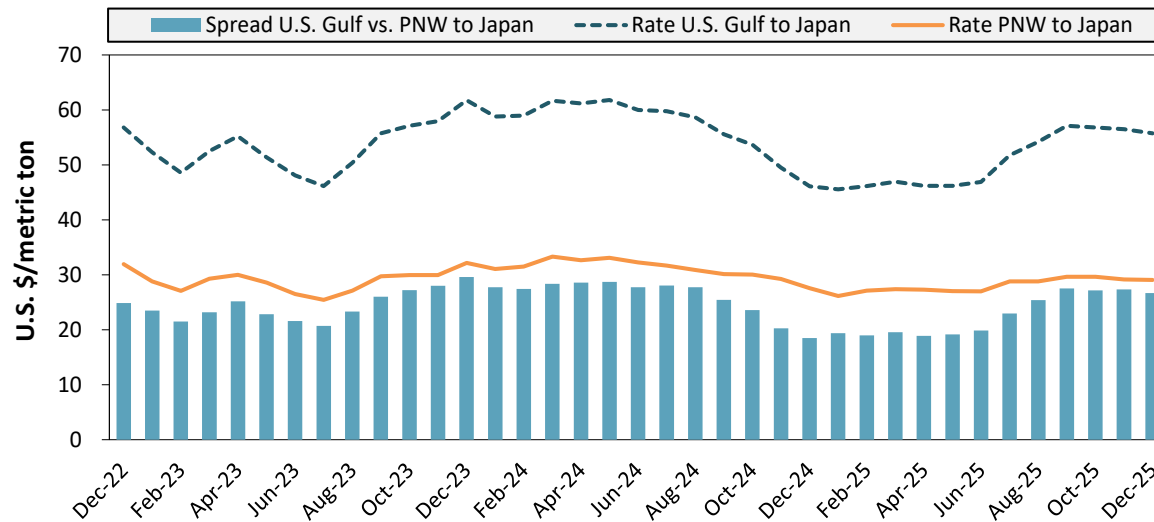


Week ending 12/25/25, number of vessels	Loaded	Due
Change from last year	-3%	-17%
Change from 4-year average	11%	-22%

Note: U.S. Gulf includes Mississippi, Texas, and the East Gulf region.

Source: USDA, Agricultural Marketing Service.

Figure 20. U.S. Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest

Source: O'Neil Commodity Consulting.

Ocean rates	U.S. Gulf	PNW	Spread
December 2025	\$55.75	\$29.08	\$26.67
Change from December 2024	21%	5%	44%
Change from 4-year average	-5%	-10%	1%

Table 20. Ocean freight rates for selected shipments, week ending 12/27/2025

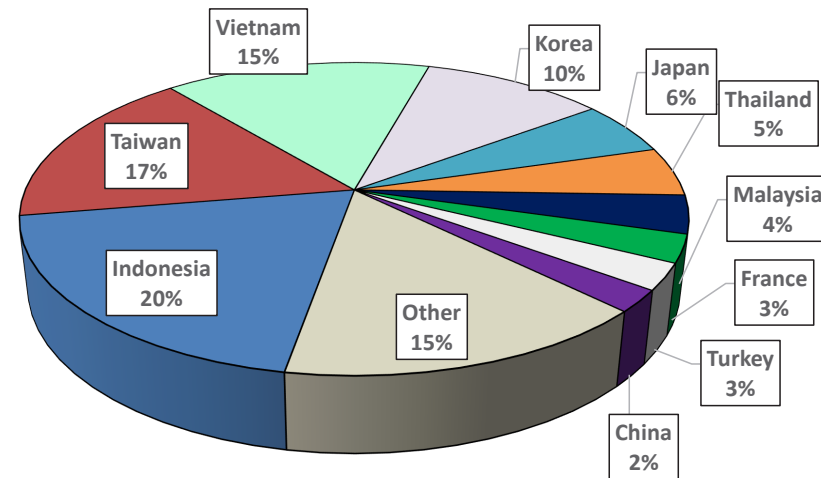
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy grain	Dec 23, 2025	Feb 1/28, 2026	66,000	46.00
U.S. Gulf	N. China	Heavy grain	Nov 27, 2025	Dec 22/31, 2025	66,000	56.00
U.S. Gulf	S. Korea	Soybeans	Dec 4, 2025	Dec 20/30, 2025	58,000	65.50
U.S. Gulf	S. Korea	Heavy grain	Aug 12, 2025	Oct 1/10, 2025	58,000	63.75
U.S. Gulf	Indonesia	Soybeans	Sep 17, 2025	Oct 15/Nov 5, 2025	68,000	50.50
U.S. Gulf	Bangladesh	Soybeans	Sep 23, 2025	Oct 1/10, 2025	55,000	65.75
PNW	China	Heavy grain	Nov 28, 2025	Jan 1/31, 2025	65,000	29.25
PNW	China	Soybeans	Nov 28, 2025	Dec 25/31, 2025	68,000	32.75
PNW	Taiwan	Wheat	Nov 13, 2025	Jan 26/Feb 5, 2025	52,000	40.25
PNW	Taiwan	Wheat	Sep 03, 2025	Nov 1/10, 2025	46,000	49.00
PNW	S. Korea	Corn	Nov 20, 2025	Jan 1/10, 2026	65,000	33.28
PNW	Taiwan	Wheat	Aug 28, 2025	Oct 1/10, 2025	46,000	48.00
Brazil	China	Heavy grain	Dec 17, 2025	Jan1/10, 2026	66,000	33.00
Brazil	N. China	Heavy grain	Oct 9, 2025	Nov 1/7, 2025	66,000	40.00
Brazil	S. Korea	Soybeans	Nov 25, 2025	Dec 1/10, 2025	60,000	47.25

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.

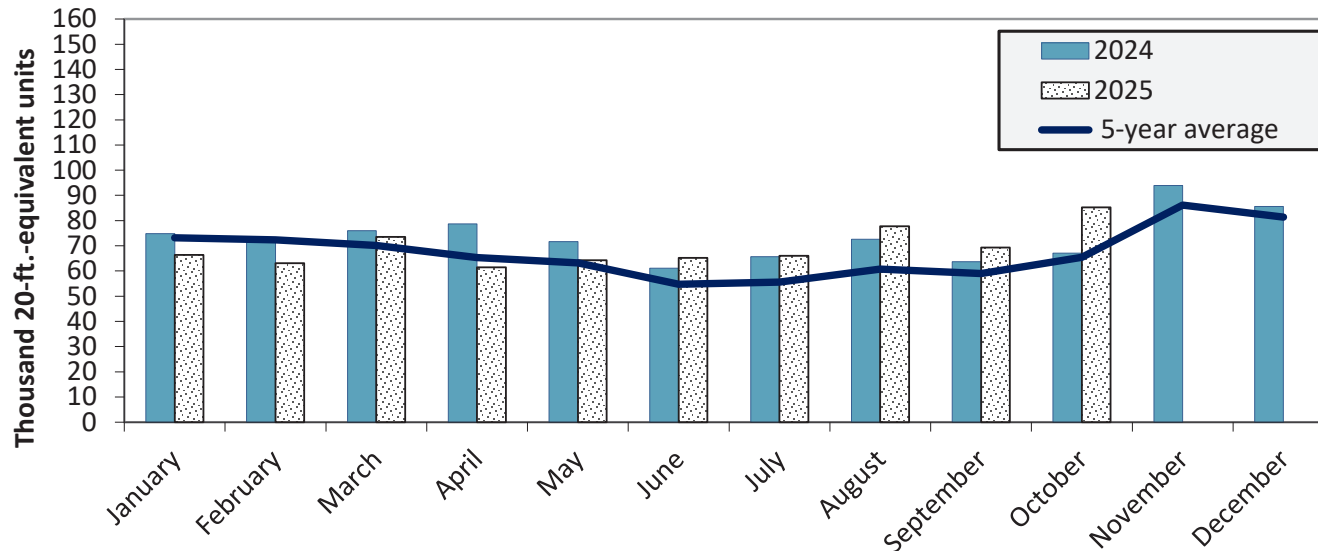
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Oct 2025



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 October 2025 were up 27.0 percent from last year and up 30.3 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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