



Grain Transportation Report

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Railroad Associations Seek 5-Year Exemption from FMCSA Hours-of-Service Requirements. On December 19, 2025, the Federal Motor Carrier Safety Administration (FMCSA) [announced](#) its decision to renew provisionally a 6-month exemption from hours-of-service (HOS) requirements, through June 18, 2026. The exemption applies to employees of member railroads of the Association of American Railroads and the American Short Line and Regional Railroad Association, while these railroad associations seek a 5-year renewal of the exemption.

The exemption allows truck drivers of railroads that are members of the two associations to respond to unplanned events outside normal work hours, operating beyond HOS regulations. The two groups seek a 5-year renewal of the HOS exemption because they believe the HOS rules inhibit a railroad's ability to respond quickly to some emergency situations.

To determine whether to renew the exemption for 5 years, FMCSA will accept comments through January 20. Comments can be submitted on [Regulations.gov](#) and entering Docket No. FMCSA-2020-0171-0015.

STB Proposes To End Long Regulatory Obstacle to Reciprocal Switching. On January 7, the Surface Transportation Board (STB) [issued a notice of proposed rulemaking](#) (NPRM) to repeal its rules on “Intramodal Rail Competition” (IRC) ([49 CFR Part 1144](#)), with comments due to STB by March 10. The rules

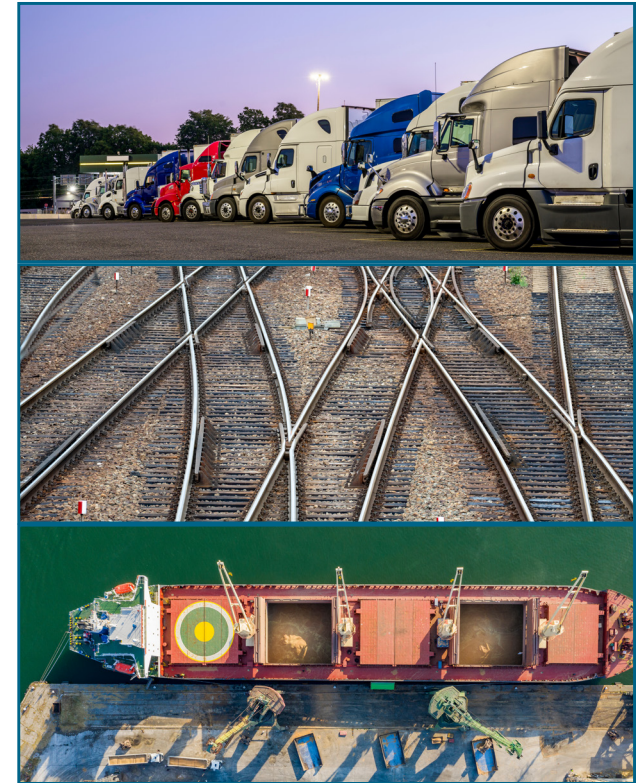
detail how STB uses its statutory authority to prescribe reciprocal switching, through routes and through rates. Under IRC rules, to obtain a reciprocal switching order, shippers must prove that their rail carrier has engaged in “anticompetitive conduct”—a requirement shippers have long argued sets “an unrealistically high bar.” STB notes the rules have rarely been invoked in the 40 years since their adoption and STB has never issued a prescription under their framework. As an alternative to the rules, STB proposes to evaluate requests case by case (under applicable statutes).

This month’s NPRM is STB’s latest action related to reciprocal switching. In 2024, STB finalized a rule on “reciprocal switching for inadequate service,” but a Federal Court vacated that rule in July 2025 ([Grain Transportation Report, July 10, 2025, second highlight](#)).

Lower Ocean Freight Rates for Grain Expected in 2026. A January [World Grain article](#) noted most analysts do not foresee bulk ocean freight rates rising in 2026. Overall, dry bulk shipping supply (from new ship deliveries) is expected to outpace demand in 2026-27—placing downward pressure on rates. Additionally, with fewer attacks on ships in the Red Sea in recent months, shipping may return to the Suez Canal and Red Sea. Such a return would raise fleet efficiency and put downward pressure on rates.

Although most analysts project lower rates, one factor that could increase rates is Chinese stockpiling of dry bulk commodities (e.g., coal,

iron ore, bauxite, grains). While analysts do not think that China’s renewed U.S. soybean purchases will significantly affect ocean rates in the medium-to-long term, these purchases could produce short-term volatility. projections for 2026-27 stand in contrast to recent trends: at the end of 2025, ocean rates were higher than a year ago ([GTR fig. 20](#)). Analysts attributed the rate rise to China’s stockpiling of iron ore and bauxite.



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 January 8, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2025/26 totaled 40.63 million metric tons (mmt), unchanged from last week and up 11 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26 were 1.14 mmt, up 202 percent from last week. Net [soybean export sales](#) were 2.06 mmt, up 135 percent from last week. Net [wheat export sales](#) were 0.16 mmt, up 32 percent from last week.

Rail

U.S. Class I railroads originated 26,544 [grain carloads](#) during the week ending January 3. This was a 7-percent increase from the previous week, 8 percent more than last year, and 12 percent more than the 3-year average.

Average January [shuttle secondary railcar bids/offers](#) (per car) were \$304 above tariff for the week ending January 8. This was \$222 less than last week and \$417 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$38 above tariff. This was \$19 more than last week and \$88 less than this week last year.

Barge

For the week ending January 10, [barged grain movements](#) totaled 528,000 tons. This was 30 percent less than the previous week and 17 percent more than the same week last year.

For the week ending January 10, 329 grain barges [moved down river](#)—150 fewer than last week. There were 831 grain barges [unloaded](#) in the New Orleans region, 1 percent fewer than last week.

Ocean

For the week ending January 8, 33 [oceangoing grain vessels](#) were loaded in the Gulf—18 percent more than the same period last year. Within the next 10 days (starting January 9), 55 vessels were expected to be loaded—25 percent more than from the same period last year.

As of January 8, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$49.00, down 2 percent from the previous week. The rate from the Pacific Northwest to Japan was \$27.50 per mt, up 4 percent from the previous week.

Fuel

For the week ending January 12, the [U.S. average diesel fuel price](#) decreased 1.8 cents from the previous week to \$3.459 per gallon, 14.3 cents below the same week last year.



From Second to Third Quarter 2025—U.S. and Brazilian Soybean Transportation Costs Rose, as Landed Costs Varied by Route

The world's two leading producers and exporters of soybeans—the United States and Brazil—compete for the same overseas markets. For both countries, the competitive-

ness of soybean exports depends on low transportation and landed costs (i.e., transportation costs plus farm values) to the key destinations of China and Europe. This

article examines quarterly and yearly changes in the costs of moving soybeans from the United States and Brazil to Shanghai, China (table 1), and to Hamburg, Germany ([table 2](#)).

Table 1. Quarterly costs of transporting soybeans from United States and Brazil to Shanghai, China

Route	Cost	2024	2025	2025	Percent change		2024	2025	2025	Percent change	
		3rd qtr.	2nd qtr.	3rd qtr.	Yr. to yr.	Qtr. to qtr.	3rd qtr.	2nd qtr.	3rd qtr.	Yr. to yr.	Qtr. to qtr.
		Minneapolis, MN					Davenport, IA				
		--\$/mt--					--\$/mt--				
United States via U.S. Gulf	Truck	17.67	18.07	17.35	-1.81	-3.98	17.67	18.07	17.35	-1.81	-3.98
	Barge	39.70	36.64	43.17	8.74	17.82	32.08	29.50	35.71	11.32	21.05
	Ocean	56.72	45.67	53.40	-5.85	16.93	56.72	45.67	53.40	-5.85	16.93
	Total transportation	114.09	100.38	113.92	-0.15	13.49	106.47	93.24	106.46	-0.01	14.18
	Farm value	377.85	366.33	356.78	-5.58	-2.61	383.36	376.01	364.99	-4.79	-2.93
	Landed cost	491.94	466.71	470.70	-4.32	0.85	489.83	469.25	471.45	-3.75	0.47
	Transport % of landed cost	23.19	21.51	24.20	1.01	2.69	21.74	19.87	22.58	0.85	2.71
Route	Cost	2024	2025	2025	Percent change		2024	2025	2025	Percent change	
		3rd qtr.	2nd qtr.	3rd qtr.	Yr. to yr.	Qtr. to qtr.	3rd qtr.	2nd qtr.	3rd qtr.	Yr. to yr.	Qtr. to qtr.
		Fargo, ND					Sioux Falls, SD				
		--\$/mt--					--\$/mt--				
United States via PNW	Truck	17.67	18.07	17.35	-1.81	-3.98	17.67	18.07	17.35	-1.81	-3.98
	Rail	63.46	61.79	61.55	-3.01	-0.39	64.67	62.93	62.66	-3.11	-0.43
	Ocean	30.23	26.62	28.30	-6.38	6.31	30.23	26.62	28.30	-6.38	6.31
	Total transportation	111.36	106.48	107.20	-3.74	0.68	112.57	107.62	108.31	-3.78	0.64
	Farm value	362.78	356.90	338.90	-6.58	-5.04	369.76	365.97	353.84	-4.31	-3.31
	Landed cost	474.14	463.38	446.10	-5.91	-3.73	482.33	473.59	462.15	-4.18	-2.42
	Transport % of landed cost	23.49	22.98	24.03	0.54	1.05	23.34	22.72	23.44	0.10	0.71
Route	Cost	2024	2025	2025	Percent change		2024	2025	2025	Percent change	
		3rd qtr.	2nd qtr.	3rd qtr.	Yr. to yr.	Qtr. to qtr.	3rd qtr.	2nd qtr.	3rd qtr.	Yr. to yr.	Qtr. to qtr.
		North MT - Santos					South GO - Paranagua				
		--\$/mt--					--\$/mt--				
Brazil	Truck	82.31	87.35	92.10	11.89	5.44	48.80	50.98	55.59	13.91	9.04
	Ocean	36.00	37.00	39.00	8.33	5.41	37.50	38.50	40.50	8.00	5.19
	Total transportation	118.31	124.35	131.10	10.81	5.43	86.30	89.48	96.09	11.34	7.39
	Farm Value	366.60	325.53	361.89	-1.28	11.17	360.62	334.59	361.35	0.20	8.00
	Landed Cost	484.91	449.88	492.99	1.67	9.58	446.92	424.07	457.44	2.35	7.87
	Transport % of landed cost	24.40	27.64	26.59	2.19	-1.05	19.31	21.10	21.01	1.70	-0.09

Note: Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary rail markets. That cost could exceed the rail tariff rate plus fuel surcharge shown in the table. Third quarter 2024 and Second quarter 2025 rates were revised from what were previously published. Source for the U.S. Ocean freight rates: O'Neil Commodity Consulting. Source for the U.S. farm values: USDA, National Agricultural Statistics Service. Landed costs are transportation cost plus farm value. For transportation as a percentage of landed costs, the year-to-year and quarter-to-quarter columns record percentage-point differences. Brazil's producing regions: MT= Mato Grosso, GO = Goiás. Brazil's export ports: Santos and Paranagua. Source for Brazil's ocean freight rates: University of São Paulo, Brazil, and USDA, Agricultural Marketing Service. Source for Brazil's farm values: Companhia Nacional de Abastecimento. qtr. = quarter; yr. = year; mt = metric ton; "-" indicates data not required or applicable. Totals may not add up exactly because of rounding.

Source: USDA, Agricultural Marketing Service.

Quarter-to-Quarter Transportation

Costs. From second quarter 2025 to third quarter 2025 (quarter to quarter), total transportation costs for exporting U.S. soybeans to China rose for routes from the U.S. Gulf and from the Pacific Northwest (PNW) ([table 1](#)). Transportation costs also rose for shipping to Germany from the U.S. Gulf ([table 2](#)). Brazil's soybean transportation costs rose for shipments to both China and Germany.

The costs of shipping from the U.S. Gulf to China and Germany rose with climbing barge and ocean freight rates. Barge rates rose as shipping capacity declined, with water levels at critical lows in the Mississippi River ([Grain Transportation Report \(GTR\), September 25, 2025](#)). Rising ocean freight rates reflected strong movements of bulk items, especially imports of iron ore and coal by China and sustained demand for grain shipments out of the U.S. Gulf ([GTR, November 27, 2025](#)).

For shipments from the PNW to China, the increases in ocean freight rates exceeded the decreases in truck and rail rates (public tariff, plus the fuel surcharge), causing transportation costs to rise. In Brazil, transportation costs rose with higher truck and ocean freight rates.

Year-to-Year Transportation Costs. From third quarter 2024 to third quarter 2025 (year to year), U.S. transportation costs fell for shipping soybeans to China and rose for routes to Europe. Over the same period, Brazil's

Table 2. Quarterly costs of transporting soybeans from United States and Brazil to Hamburg, Germany

Route	Cost	2024	2025	2025	Percent change		2024	2025	2025	Percent change	
		3rd qtr.	2nd qtr.	3rd qtr.	Yr. to yr.	Qtr. to qtr.	3rd qtr.	2nd qtr.	3rd qtr.	Yr. to yr.	Qtr. to qtr.
		Minneapolis, MN					Davenport, IA				
		--\$/mt--					--\$/mt--				
United States via U.S. Gulf	Truck	17.67	18.07	17.35	-1.81	-3.98	17.67	18.07	17.35	-1.81	-3.98
	Barge	39.70	36.64	43.17	8.74	17.82	32.08	29.50	35.71	11.32	21.05
	Ocean	26.41	22.71	24.56	-7.00	8.15	26.41	22.71	24.56	-7.00	8.15
	Total transportation	83.78	77.42	85.08	1.55	9.89	76.16	70.28	77.62	1.92	10.44
	Farm value	377.85	366.33	356.78	-5.58	-2.61	383.36	376.01	364.99	-4.79	-2.93
	Landed cost	461.63	443.75	441.86	-4.28	-0.43	459.52	446.29	442.61	-3.68	-0.82
	Transport % of landed cost	18.15	17.45	19.25	1.11	1.81	16.57	15.75	17.54	0.96	1.79
Route	Cost	2024	2025	2025	Percent change		2024	2025	2025	Percent change	
		3rd qtr.	2nd qtr.	3rd qtr.	Yr. to yr.	Qtr. to qtr.	3rd qtr.	2nd qtr.	3rd qtr.	Yr. to yr.	Qtr. to qtr.
		North MT - Santos					South GO - Paranagua				
		--\$/mt--					--\$/mt--				
Brazil	Truck	82.31	87.35	92.10	11.89	5.44	48.80	50.98	55.59	13.91	9.04
	Ocean	33.80	34.75	36.50	7.99	5.04	33.50	34.50	36.30	8.36	5.22
	Total transportation	116.11	122.10	128.60	10.76	5.32	82.30	85.48	91.89	11.65	7.50
	Farm Value	366.60	325.53	361.89	-1.28	11.17	360.62	334.69	361.35	0.20	7.97
	Landed Cost	482.71	447.63	490.49	1.61	9.57	442.92	420.17	453.24	2.33	7.87
	Transport % of landed cost	24.05	27.28	26.22	2.16	-1.06	18.58	20.34	20.27	1.69	-0.07

Note: Source for the U.S. Ocean freight rates: O'Neil Commodity Consulting. Source for the U.S. farm values: USDA, National Agricultural Statistics Service. Landed costs are transportation costs plus farm values. For transportation as a percentage of landed costs, the year-to-year and quarter-to-quarter columns record percentage-point differences. Brazil's producing regions: MT = Mato Grosso, GO = Goiás. Brazil's export ports: Santos and Paranagua. Source for Brazil's ocean freight rates: University of São Paulo, Brazil, and USDA, Agricultural Marketing Service. Source for Brazil's farm values: Companhia Nacional de Abastecimento. qtr. = quarter; yr. = year; mt = metric ton; "-" indicates data not required or applicable. Totals may not add up exactly because of rounding. Source: USDA, Agricultural Marketing Service.

transportation costs rose to both China and Europe. In the United States, lower truck, rail, and ocean freight rates pushed down total transportation costs for shipments to China, while higher barge rates pushed up costs to Europe. In Brazil, higher truck and ocean freight rates pushed up total transportation costs for shipments destined to China and Europe.

Quarter-to-Quarter Landed Costs. Quarter to quarter, for shipments from the U.S. Gulf to China, higher transportation costs raised landed costs, while from the PNW to China, declining farm values lowered landed costs. For shipments from the U.S. Gulf to Europe, declining farm values lowered landed costs. For shipments from Brazil, increases in both transportation costs and farm values raised landed costs to both China and Europe.

For U.S. shipments to China, transportation costs accounted for 23-24 percent of third-quarter U.S. landed costs ([table 1](#)). For shipments to Germany, that share was 18-19 percent ([table 2](#)). For Brazilian shipments to China, transportation costs were 21-27 percent of total third-quarter Brazilian landed costs, and for shipments to Germany, 20-26 percent of total third-quarter Brazilian landed costs ([tables 1](#) and [2](#)).

Year-to-Year Landed Costs. Year to year, landed costs fell in the United States and rose in Brazil. For exports from the PNW to China, a year-to-year decrease in landed costs reflected lower transportation costs and lower soybean farm values. For exports from the U.S. Gulf to China and from the PNW to Europe, a decrease in landed costs mainly reflected lower soybean farm values. For exports from Brazil, higher landed costs mainly reflected higher transportation costs.

U.S. Exports to China. According to export sales data from USDA's Foreign Agricultural Service, year to date for MY 2025/26 (as of January 1, 2026), China had purchased 6.9 million metric tons (mmt) of U.S. soybeans. Of these 5.7 mmt were currently unshipped, representing potential future transportation demand.

Total U.S. soybean exports are projected at 42.86 mmt in marketing year (MY) 2025/26, down from 51.23 mmt in MY 2024/25, according to USDA's January 2026 [World Agricultural Supply and Demand Estimates report](#). On the other hand, Brazil is projected to export 114.0 mmt in MY 2025/26, up from 103.14 mmt in MY 2024/25. For more on soybean transportation in Brazil, see the quarterly [Brazil Soybean Transportation](#) report.

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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.

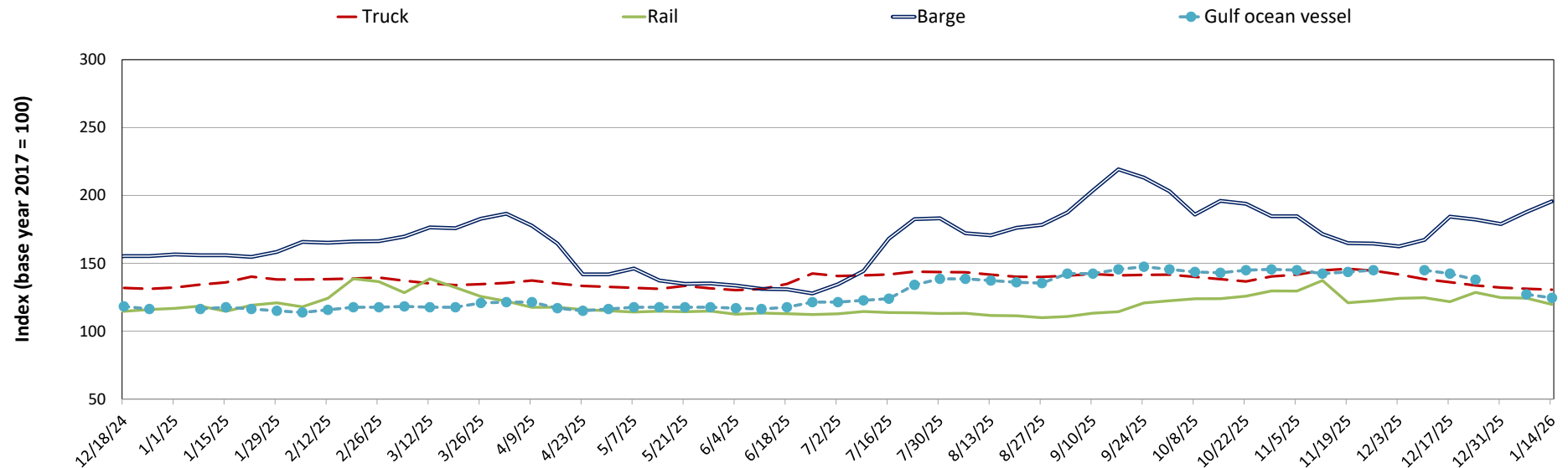
Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
01/14/26	131	120	196	125	131
01/07/26	131	124	188	127	126
01/15/25	136	115	156	118	124

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.

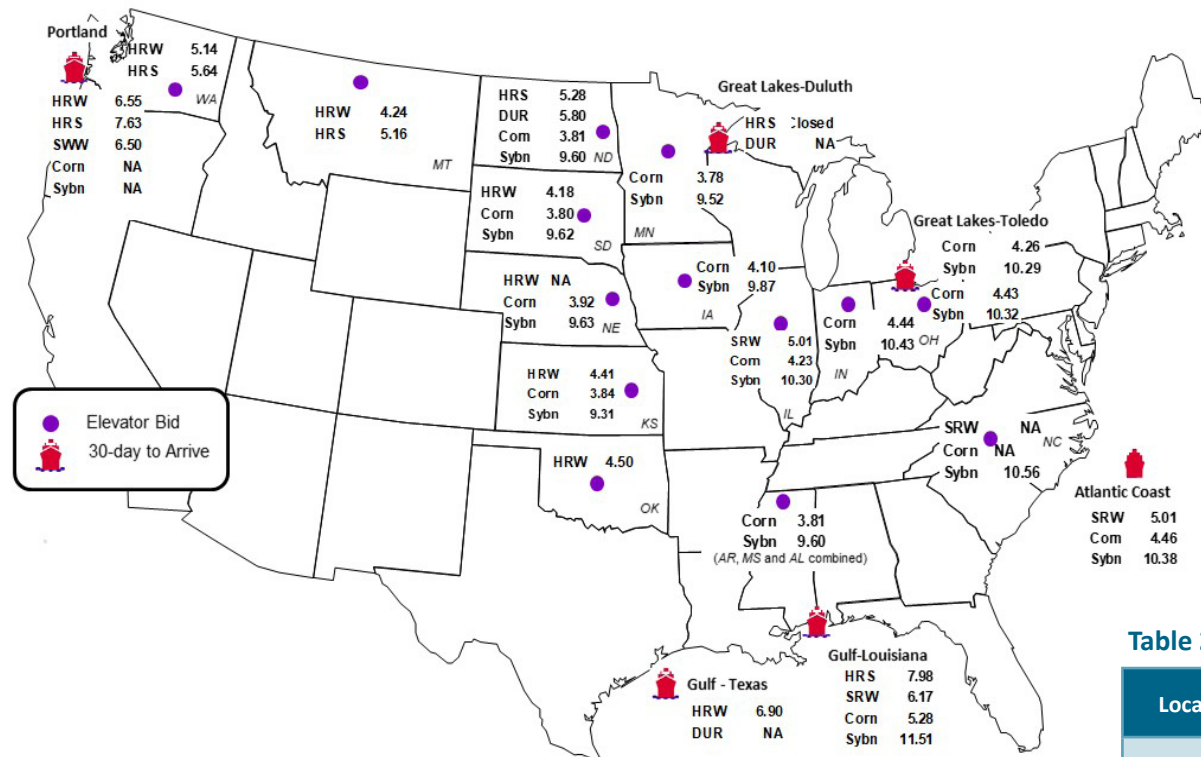
Figure 1. Grain transportation cost indicators as of week ending 1/14/26



Source: USDA, Agricultural Marketing Service.

Figure 2. Grain bid summary

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



Inland bids: 12% HRW, 14% HRS, #1 SRW, #1 DUR, #1 SWW, #2 Y Corn, #1 Y Soybeans
 Export bids: Ord HRW, 14% HRS, #2 SRW, #2 DUR, #2 SWW, #2 Y Corn, #1 Soybeans
 Note: HRW = Hard red winter wheat, HRS = Hard red spring wheat, SRW = Soft red winter wheat, DUR = Durum, SWW = Soft white winter wheat, Y = Yellow, Ord = Ordinary. Data from tables 2a and 2b derived from map information.
 Sources: 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	1/9/2026	1/2/2026
Corn	IL-Gulf	-1.05	-0.98
Corn	NE-Gulf	-1.36	-1.29
Soybean	IA-Gulf	-1.64	-1.57
HRW	KS-Gulf	-2.49	-2.31
HRS	ND-Portland	-2.35	-2.51

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	1/9/2026	Week ago 1/2/2026	Year ago 1/10/2025
Kansas City	Wheat	Mar	5.302	5.150	5.546
Minneapolis	Wheat	Mar	5.675	5.708	5.842
Chicago	Wheat	Mar	5.174	5.066	5.362
Chicago	Corn	Mar	4.458	4.374	4.730
Chicago	Soybean	Mar	10.626	10.456	10.272

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.

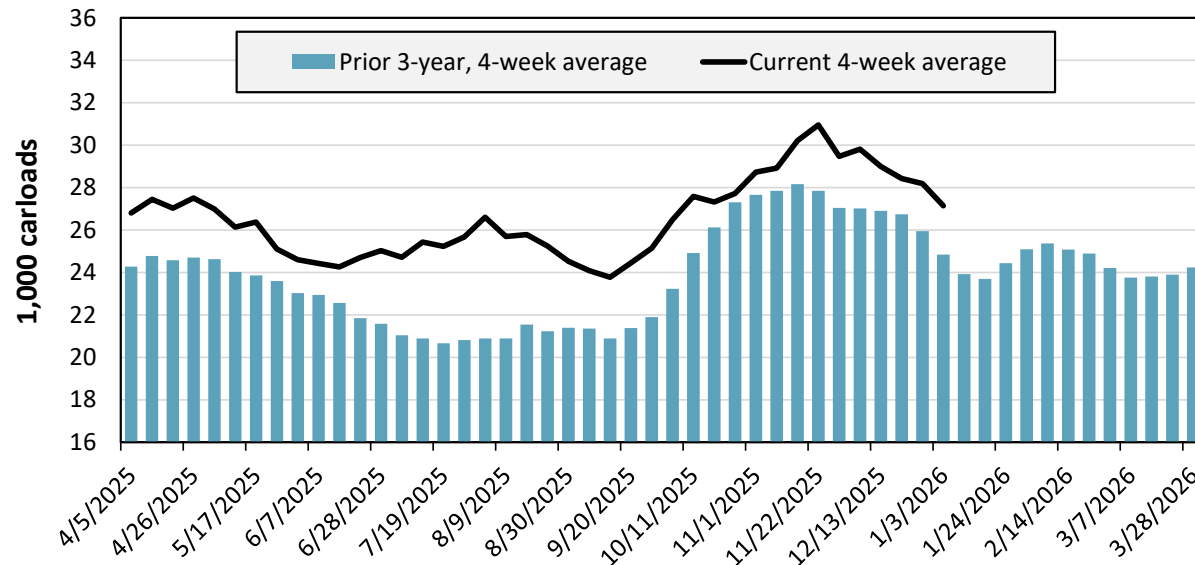
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 1/03/2026	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,347	2,252	11,681	5,742	3,718	1,804	26,544
This week last year	1,774	2,776	10,967	5,431	2,217	1,321	24,486
2025 YTD	81,717	140,116	608,958	313,968	157,757	79,502	1,382,018
2024 YTD	89,685	146,129	568,511	284,963	144,600	59,833	1,293,721
2025 YTD as % of 2024 YTD	91	96	107	110	109	133	107
Last 4 weeks as % of 2024	86	79	112	97	127	136	106
Last 4 weeks as % of 3-yr. avg.	78	85	114	109	126	134	109
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 January 3, grain carloads were down 4 percent from the previous week, up 6 percent from last year, and up 9 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: 1/2/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	27.8	38.1	36.1	14.5	21.3	24.0	27.0
	Average over last 4 weeks	20.8	27.9	33.7	13.7	12.9	30.2	23.2
	Average of same 4 weeks last year	28.4	28.8	24.6	14.8	10.1	n/a	21.4
Average grain unit train speeds (miles per hour)	This week	25.3	21.0	26.3	24.8	25.2	23.5	24.3
	Average over last 4 weeks	24.2	20.2	25.5	23.8	24.0	20.2	23.0
	Average of same 4 weeks last year	23.0	20.5	26.3	23.1	25.7	n/a	23.7

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

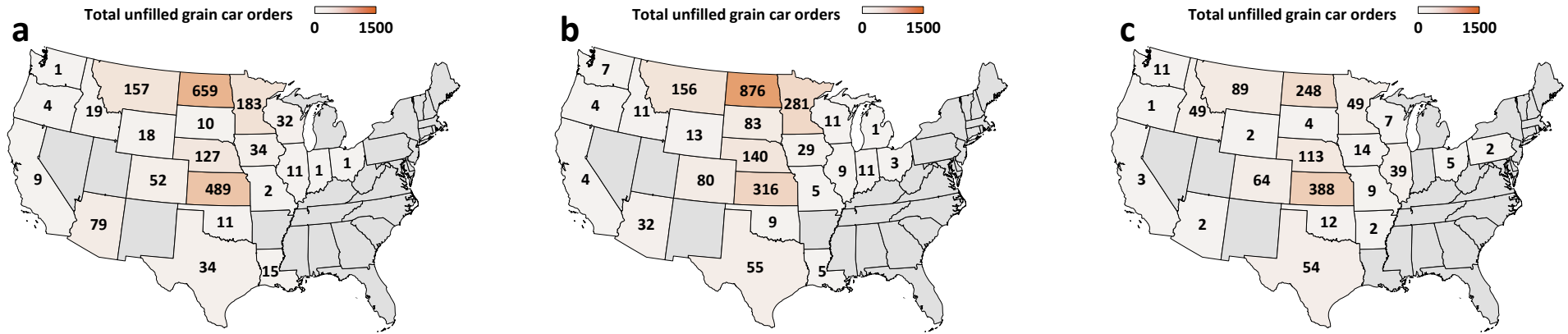
For the week ending: 1/2/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	32	6	452	88	4	230	813
	Average over last 4 weeks	36	10	380	64	11	242	741
	Average of same 4 weeks last year	60	6	435	88	6	n/a	596
Average number of loaded grain cars not moved in over 48 hours	This week	38	302	876	68	24	414	1,722
	Average over last 4 weeks	45	254	849	69	24	579	1,820
	Average of same 4 weeks last year	75	247	700	103	2	n/a	1,127
Average number of grain unit trains held	This week	0	0	3	4	0	2	9
	Average over last 4 weeks	0	0	5	4	1	4	13
	Average of same 4 weeks last year	1	0	17	5	0	n/a	24
Total unfilled manifest grain car orders	This week	2	0	1,010	529	0	407	1,948
	Average over last 4 weeks	17	0	1,276	375	0	469	2,137
	Average of same 4 weeks last year	3	5	374	666	0	n/a	1,048

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](#).

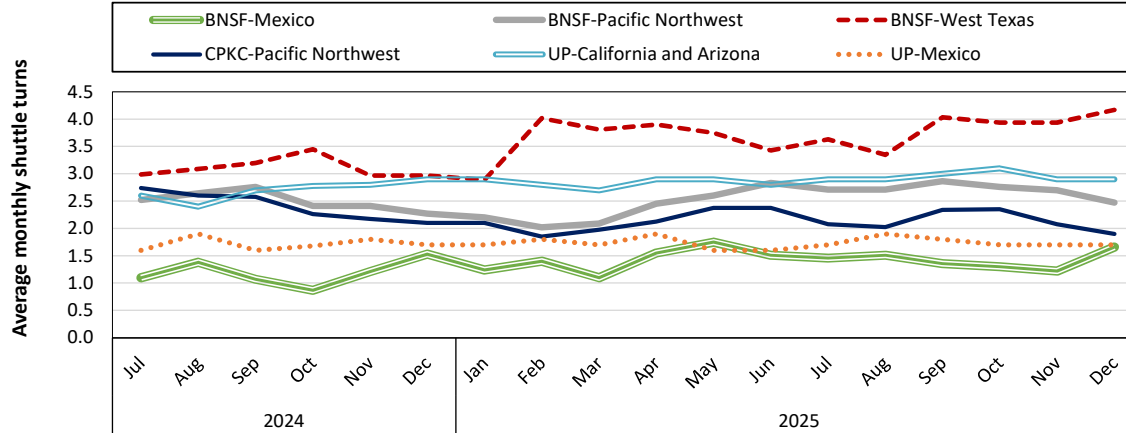
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 1/2/2026 (a); average over last 4 weeks (b); and average over same 4 weeks last year (c)



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

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

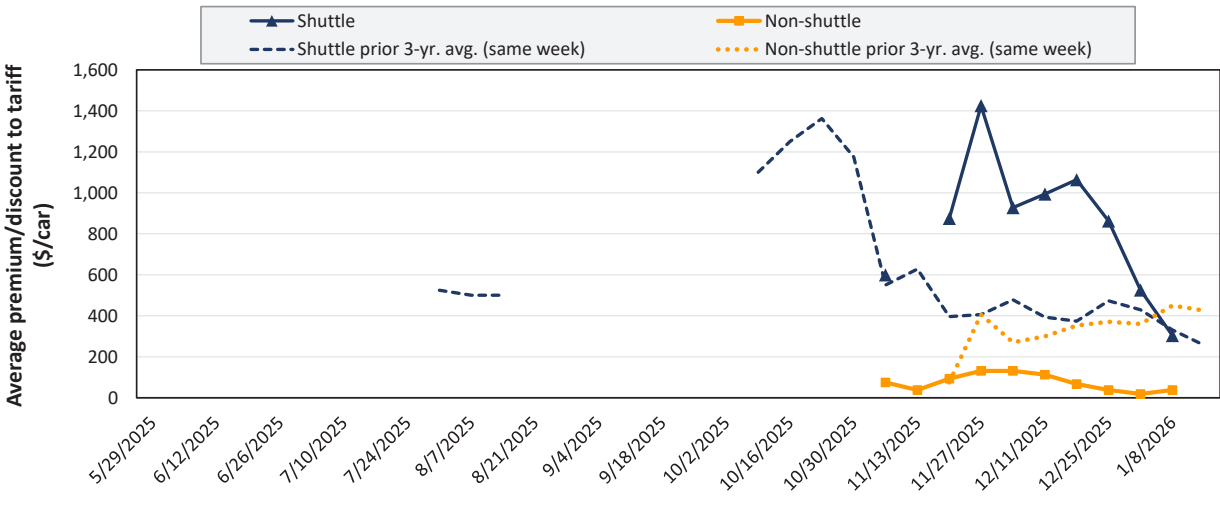


In December 2025, BNSF Railway's average monthly grain shuttle turns were 1.7 to Mexico, 2.5 to the Pacific Northwest, and 4.2 to West Texas. CPKC's shuttle turns averaged 1.9 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.7 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.org/). 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



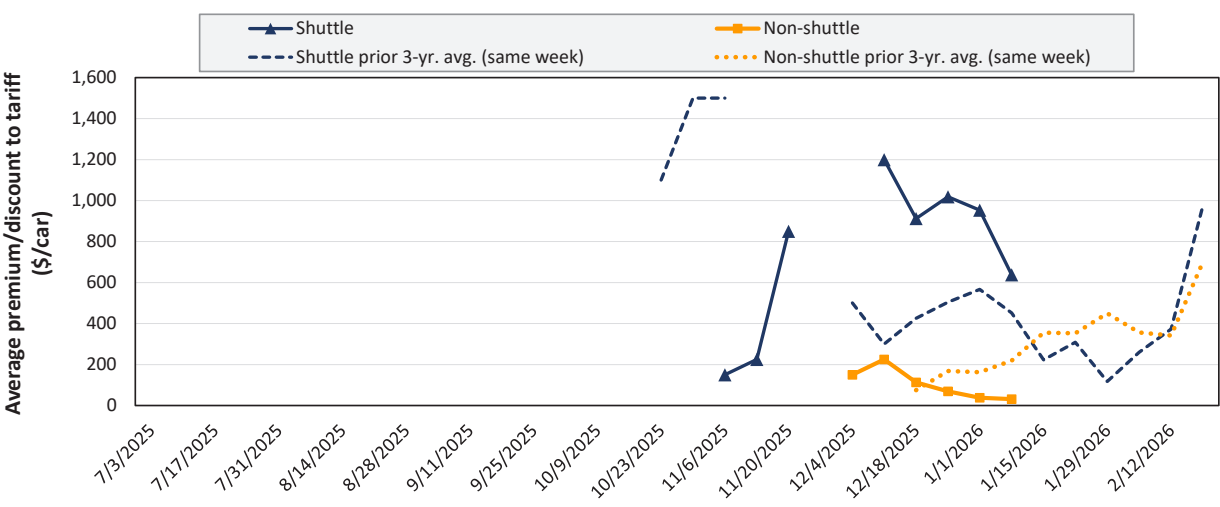
Average non-shuttle bids/offers rose \$19 this week, and are \$94 below the peak.

Average shuttle bids/offers fell \$222 this week and are \$1,121 below the peak.

1/8/2026	BNSF	UP
Non-Shuttle	\$38	n/a
Shuttle	\$300	\$308

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



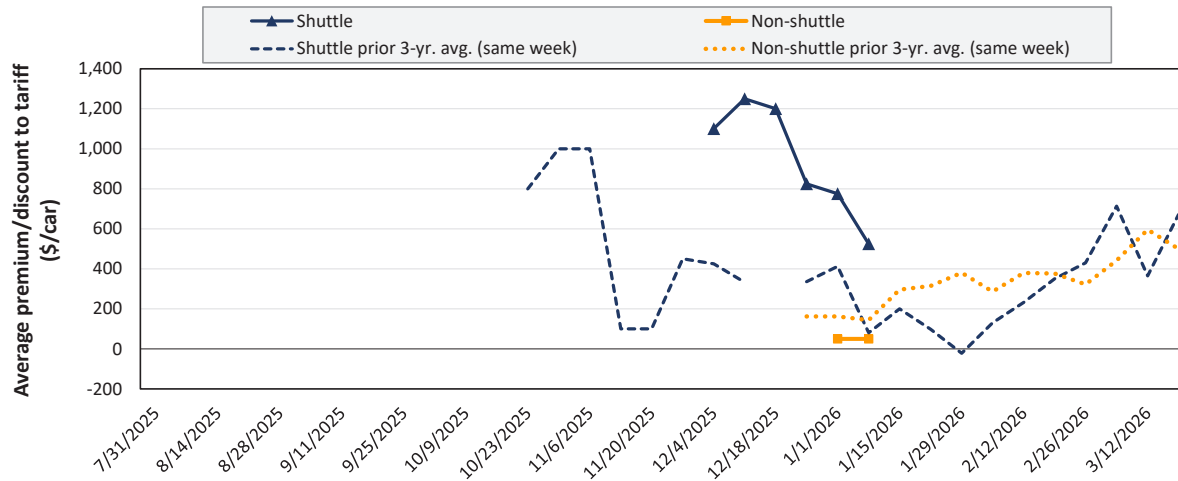
Average non-shuttle bids/offers fell \$6 this week, and are \$194 below the peak.

Average shuttle bids/offers fell \$316 this week and are \$563 below the peak.

1/8/2026	BNSF	UP
Non-Shuttle	\$13	\$50
Shuttle	\$800	\$475

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



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

Average shuttle bids/offers fell \$250 this week and are \$725 below the peak.

1/8/2026	BNSF	UP
Non-Shuttle	\$50	\$50
Shuttle	\$700	\$350

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: 1/8/2026		Delivery period					
		Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26
Non-shuttle	BNSF	38	13	50	n/a	n/a	n/a
	Change from last week	25	-13	0	n/a	n/a	n/a
	Change from same week 2025	-88	-113	0	n/a	n/a	n/a
	UP	n/a	50	50	n/a	n/a	n/a
	Change from last week	n/a	0	n/a	n/a	n/a	n/a
	Change from same week 2025	n/a	-50	-50	n/a	n/a	n/a
Shuttle	BNSF	300	800	700	425	n/a	n/a
	Change from last week	-283	-450	-400	-125	n/a	n/a
	Change from same week 2025	300	575	550	n/a	n/a	n/a
	UP	308	475	350	n/a	n/a	n/a
	Change from last week	-161	-181	-100	n/a	n/a	n/a
	Change from same week 2025	533	775	600	n/a	n/a	n/a
	CPKC	175	200	n/a	n/a	n/a	n/a
	Change from last week	-100	-200	n/a	n/a	n/a	n/a
	Change from same week 2025	175	100	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

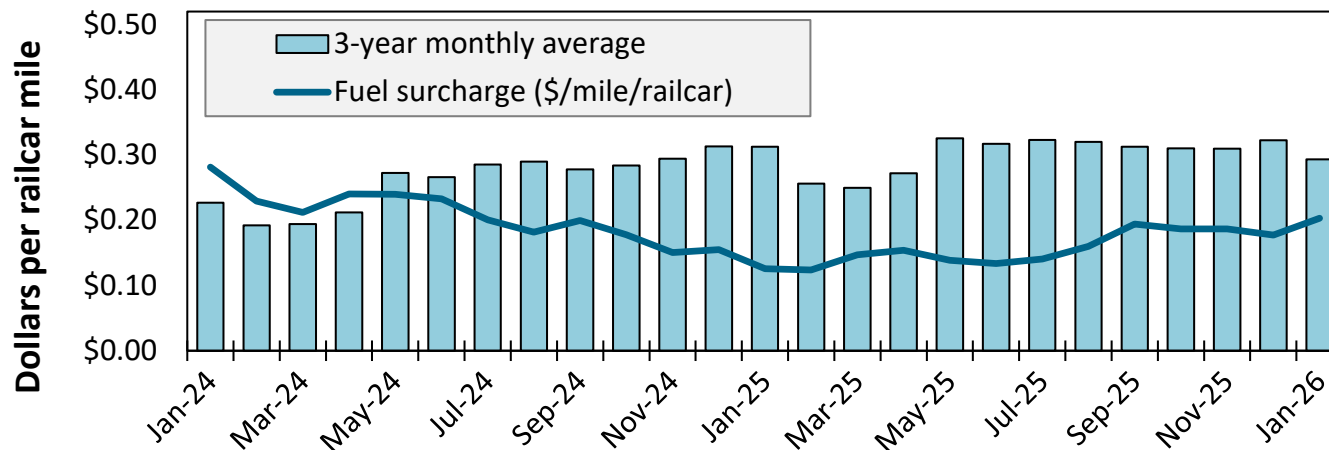
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage 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 9. Railroad fuel surcharges, North American weighted average



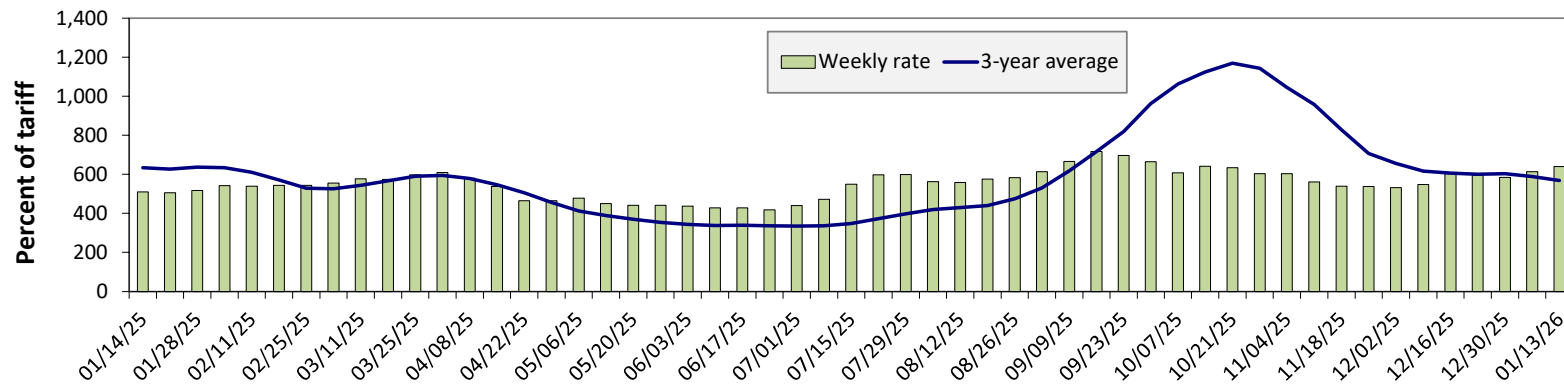
January 2026: \$0.20/mile, up 2 cents from last month's surcharge of \$0.18/mile; up 7 cents from the January 2025 surcharge of \$0.13/mile; and down 9 cents from the January prior 3-year average of \$0.29/mile.

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.

GTR 01-15-26

Figure 10. Illinois River barge freight rate



For the week ending January 13: 4 percent higher than the previous week; 25 percent higher than last year; and 13 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	1/13/2026	n/a	638	640	516	546	464
	1/6/2026	n/a	613	614	510	514	410
\$/ton	1/13/2026	n/a	33.94	29.70	20.59	25.61	14.57
	1/6/2026	n/a	32.61	28.49	20.35	24.11	12.87
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	25	38	56	77
	3-year avg.	n/a	n/a	13	15	17	31
Rate	February	n/a	650	573	480	505	403
	April	586	554	502	422	441	366

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](#).

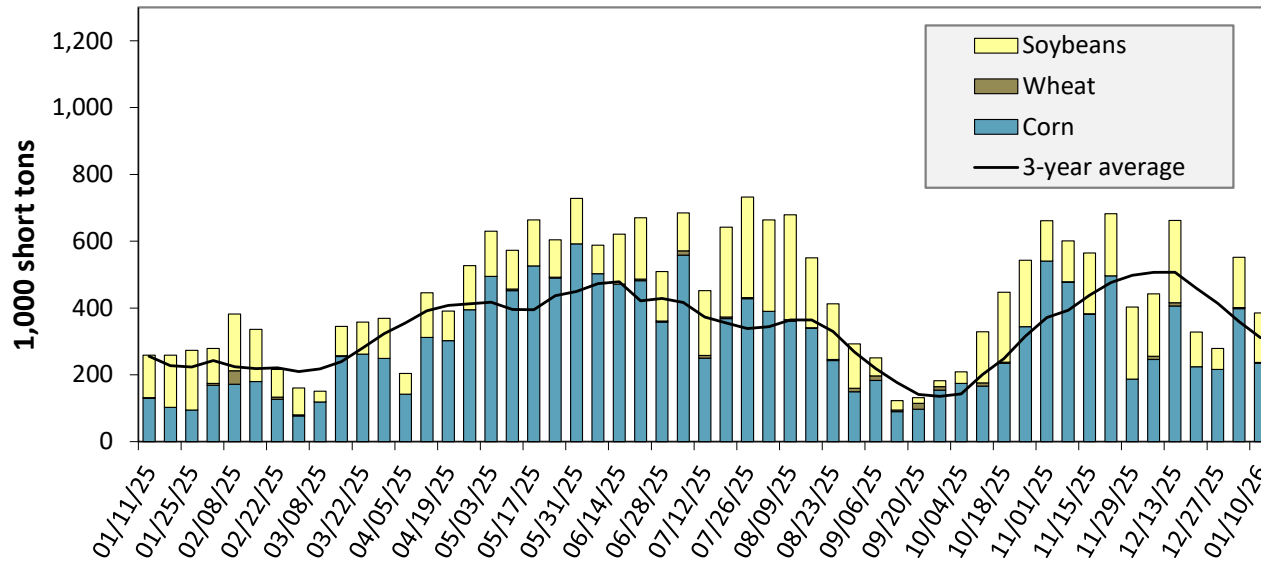
Source: USDA, Agricultural Marketing Service.

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 January 10: 49 percent higher than last year and 24 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.

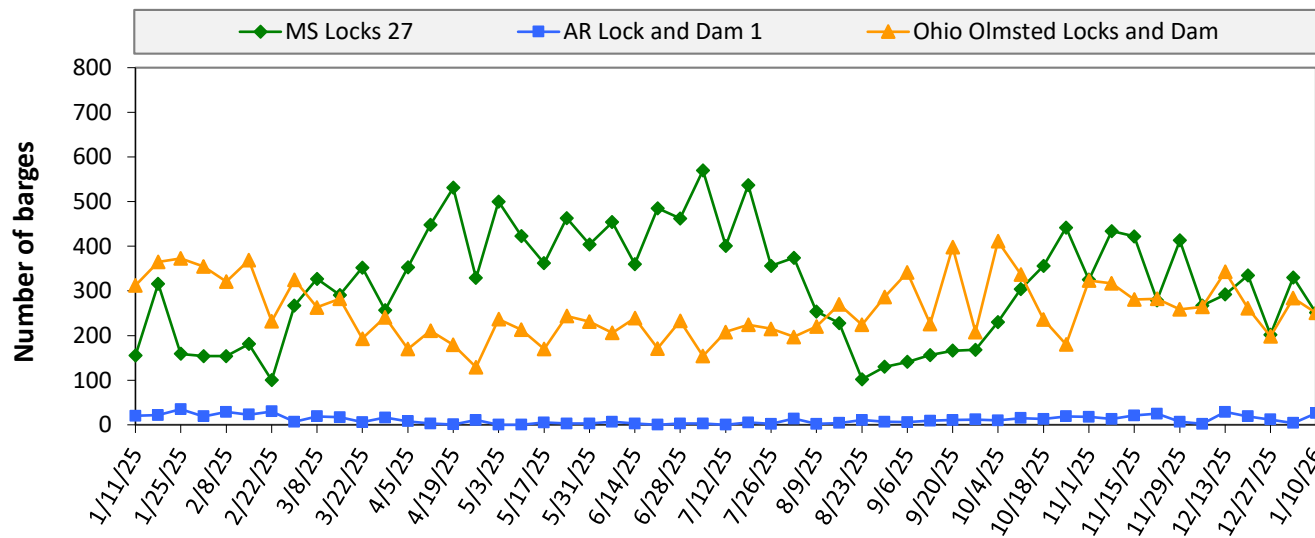
Table 10. Barged grain movements (1,000 tons)

For the week ending 01/10/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	0	0	0	0	0
Mississippi River (Winfield, MO (L25))	72	2	18	0	91
Mississippi River (Alton, IL (L26))	234	2	137	0	372
Mississippi River (Granite City, IL (L27))	235	2	148	0	384
Illinois River (La Grange)	152	0	86	0	238
Ohio River (Olmsted)	76	2	38	0	116
Arkansas River (L1)	0	14	14	0	28
Weekly total - 2026	311	17	200	0	528
Weekly total - 2025	219	6	228	0	452
2026 YTD	311	17	200	0	528
2025 YTD	541	12	601	0	1,155
2026 as % of 2025 YTD	57	142	33	-	46
Last 4 weeks as % of 2025	90	61	62	0	76
Total 2025	20,015	1,259	11,322	166	32,761

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

Source: U.S. Army Corps of Engineers.

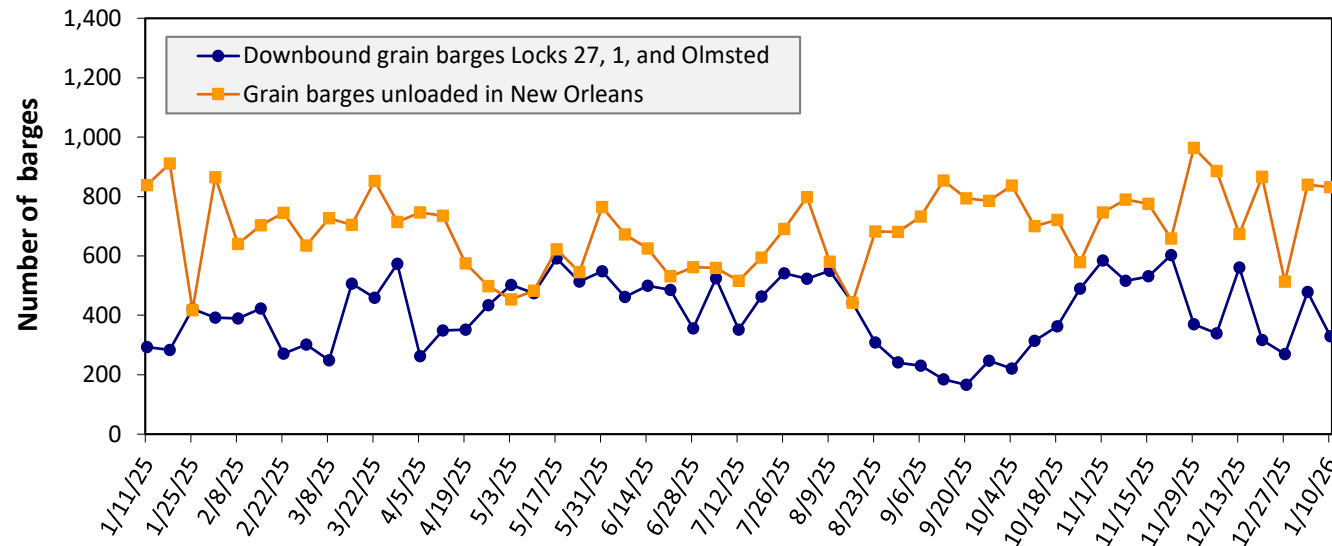
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending January 10: 528 barges transited the locks, 90 barges fewer than the previous week, and 4 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 January 10: 329 barges moved down river, 150 fewer than the previous week; 831 grain barges unloaded in the New Orleans Region, 1 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	
		January 2026	December 2025	January 2025	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$22.61	\$22.79	\$21.50	5.1	4.6
	Central Ferry, WA/Almota, WA	\$21.68	\$21.86	\$20.60	5.2	4.5
	Lyons Ferry, WA	\$20.63	\$20.81	\$19.59	5.3	4.3
	Windust, WA/Lower Monumental, WA	\$19.56	\$19.74	\$18.56	5.4	4.1
	Sheffler, WA	\$19.53	\$19.71	\$18.53	5.4	4.1
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$18.29	\$18.47	\$17.33	5.5	3.8
	Port Kelly, WA/Wallula, WA	\$18.06	\$18.24	\$17.11	5.5	3.7
	Umatilla, OR	\$17.96	\$18.14	\$17.01	5.6	3.7
	Boardman, OR/Hogue Warner, OR	\$17.69	\$17.87	\$16.75	5.6	3.7
	Arlington, OR/Roosevelt, WA	\$17.53	\$17.71	\$16.59	5.6	3.6
	Biggs, OR	\$16.15	\$16.33	\$15.26	5.8	3.2
	The Dalles, OR	\$15.01	\$15.19	\$14.16	6.0	2.9

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)

December, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	405	0	405
Columbia River (Bonneville Lock and Dam (L1))	457	0	457
Monthly total 2025	457	0	457
Monthly total 2024	264	0	264
2025 YTD	4,326	0	4,326
2024 YTD	3,523	0	3,523

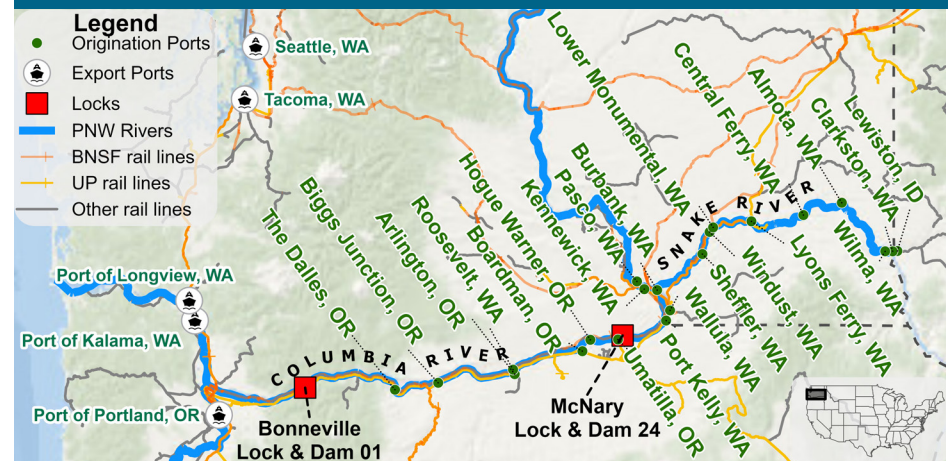
Note: "Other" refers to corn, soybeans, oats, barley, and rye. Totals may not add up because of rounding. "Monthly total" refers to grain moving through Lock 1, headed for export.

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.

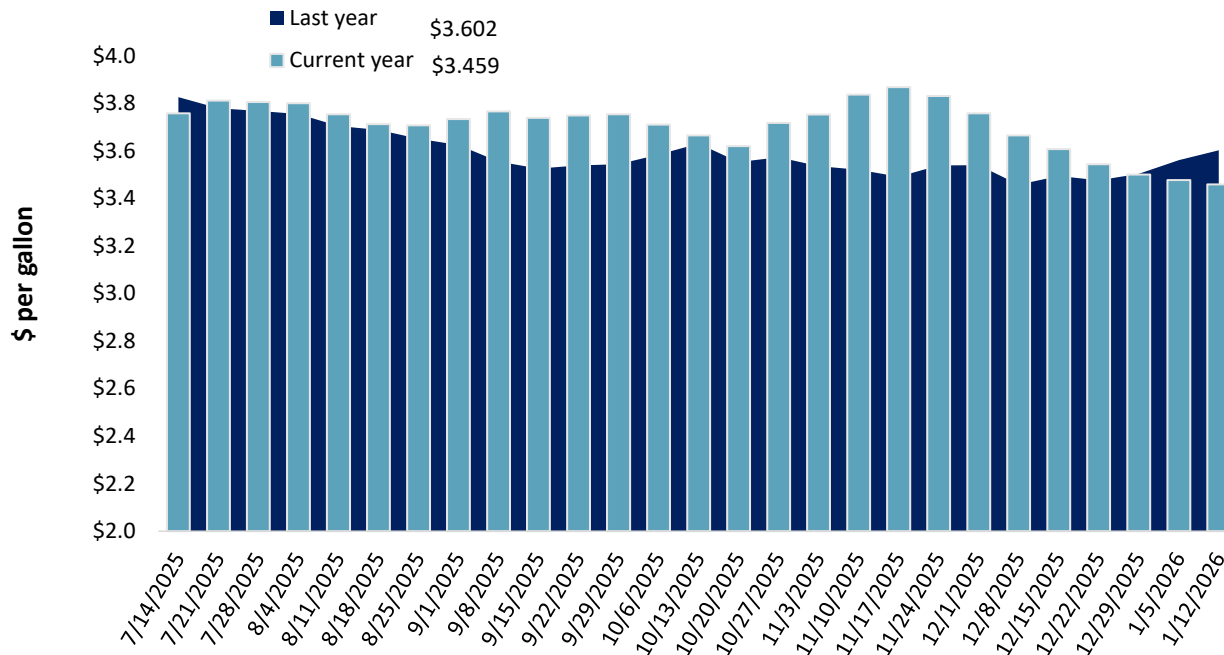
Table 13. Retail on-highway diesel prices, week ending 1/12/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.613	-0.017	-0.105
	New England	4.010	-0.014	0.189
	Central Atlantic	3.858	-0.014	-0.018
	Lower Atlantic	3.484	-0.018	-0.165
II	Midwest	3.365	-0.022	-0.167
III	Gulf Coast	3.160	-0.012	-0.161
IV	Rocky Mountain	3.185	-0.037	-0.214
V	West Coast	4.110	-0.018	-0.103
	West Coast less California	3.674	-0.009	-0.102
	California	4.613	-0.028	-0.103
Total	United States	3.459	-0.018	-0.143

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 January 12, the U.S. average diesel fuel price decreased 1.8 cents from the previous week to \$3.459 per gallon, 14.3 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 1/8/2026	1,371	737	1,337	1,361	100	4,907	23,065	12,654	40,625
	This week year ago	1,065	735	1,586	1,456	128	4,970	22,174	9,523	36,667
	Last 4 wks. as % of same period 2024/25	142	104	85	94	95	103	108	131	114
Current shipped (cumulative) exports sales	2025/26 YTD	5,920	2,016	3,856	3,258	316	15,366	28,970	17,984	62,319
	2024/25YTD	3,005	1,851	4,144	3,332	227	12,559	18,096	31,160	61,815
	YTD 2025/26 as % of 2024/25	197	109	93	98	139	122	160	58	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 1/8/2026	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	17,665	15,506	14	19,839
Japan	7,672	5,448	41	10,478
Colombia	3,976	3,996	-1	5,493
China	0	26	-100	3,461
Korea	4,546	1,563	191	3,127
Top 5 importers	29,312	24,976	17	39,272
Total U.S. corn export sales	52,035	40,270	29	54,276
% of YTD current month's export projection	64%	55%	-	-
Change from prior week	1,140	1,024	-	-
Top 5 importers' share of U.S. corn export sales	56%	62%	-	72%
USDA forecast January 2026	81,284	72,597	12	-
Corn use for ethanol USDA forecast, January 2026	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 1/8/2026	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	8,117	19,182	-58	26,078
Mexico	3,669	3,412	8	4,762
Japan	1,201	1,233	-3	2,107
Egypt	2,828	1,761	61	2,098
Indonesia	1,182	1,022	16	1,997
Top 5 importers	16,996	26,610	-36	37,042
Total U.S. soybean export sales	30,638	40,683	-25	48,941
% of YTD current month's export projection	71%	79%	-	-
Change from prior week	2,062	501	-	-
Top 5 importers' share of U.S. soybean export sales	55%	65%	-	76%
USDA forecast, January 2025	42,864	51,220	-16	-

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 1/8/2026	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	3,394	3,195	6	3,358
Philippines	2,365	2,230	6	2,473
Japan	1,672	1,667	0	2,045
China	199	139	43	1,137
Korea	1,667	1,957	-15	1,674
Taiwan	782	847	-8	935
Thailand	525	768	-32	667
Nigeria	1,220	430	184	629
Indonesia	942	641	47	518
Colombia	589	348	69	489
Top 10 importers	13,354	12,223	9	13,926
Total U.S. wheat export sales	20,272	17,530	16	19,135
% of YTD current month's export projection	83%	78%	-	-
Change from prior week	156	513	-	-
Top 10 importers' share of U.S. wheat export sales	66%	70%	-	73%
USDA forecast, January 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)

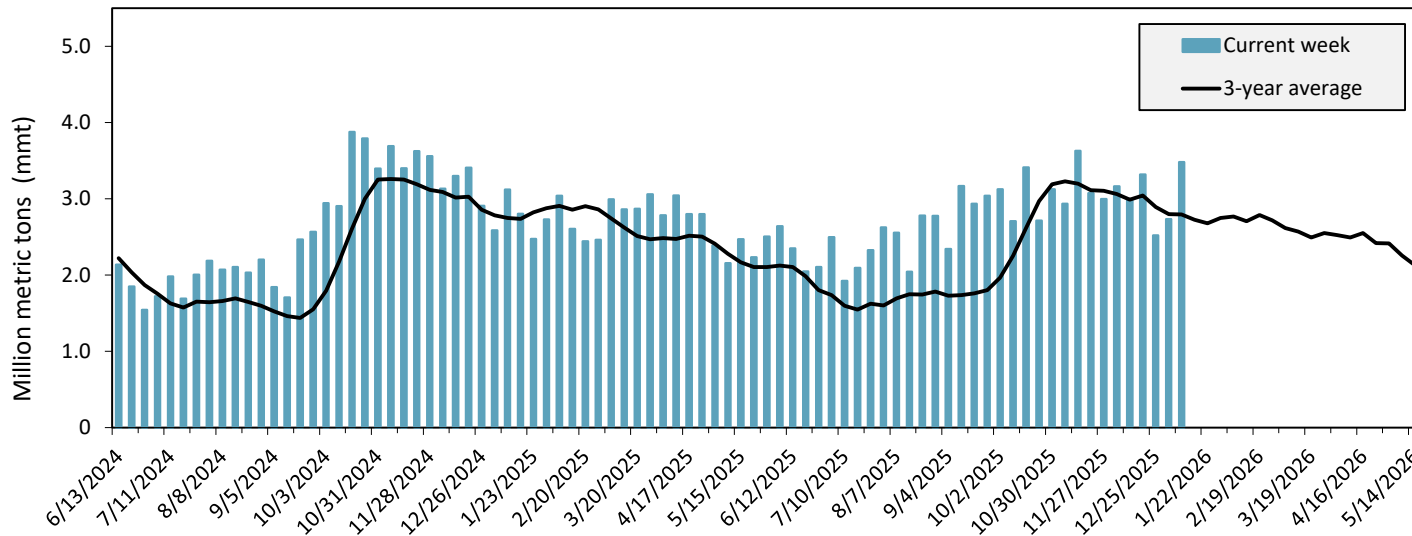
Port regions	Commodity	For the week ending 01/08/2026	Previous week*	Current week as % of previous	2026 YTD*	2025 YTD*	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	467	592	79	467	400	117	181	225	24,214
	Soybeans	340	134	254	340	406	84	44	52	2,957
	Wheat	140	100	141	140	77	181	116	111	12,271
	All grain	947	902	105	947	883	107	111	122	39,721
Mississippi Gulf	Corn	618	439	141	692	796	87	100	123	37,115
	Soybeans	955	637	150	955	875	109	76	78	23,350
	Wheat	21	12	172	28	54	52	97	124	3,980
	All grain	1,594	1,088	146	1,675	1,725	97	86	95	64,484
Texas Gulf	Corn	24	0	n/a	24	6	370	100	78	590
	Soybeans	53	57	92	53	0	n/a	77	119	1,431
	Wheat	127	33	385	127	48	264	110	176	4,690
	All grain	332	256	130	384	55	698	165	176	7,774
Interior	Corn	347	285	121	347	214	162	155	154	15,546
	Soybeans	120	92	131	122	134	91	89	89	7,685
	Wheat	29	39	75	32	89	36	50	61	3,063
	All grain	511	418	122	515	450	114	115	119	26,818
Great Lakes	Corn	0	0	n/a	0	0	n/a	77	205	414
	Soybeans	0	0	n/a	0	0	n/a	0	0	63
	Wheat	0	0	n/a	0	11	0	110	119	434
	All grain	0	0	n/a	0	11	0	85	119	911
Atlantic	Corn	35	5	730	35	7	479	285	246	607
	Soybeans	62	65	96	62	50	125	68	62	1,085
	Wheat	0	0	n/a	0	0	n/a	0	0	81
	All grain	96	69	139	96	57	170	83	76	1,773
All Regions	Corn	1,490	1,321	113	1,564	1,423	110	131	155	78,486
	Soybeans	1,530	984	155	1,531	1,465	105	69	73	36,823
	Wheat	317	183	173	327	279	117	101	112	24,519
	All grain	3,480	2,733	127	3,617	3,180	114	99	108	141,734

*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.

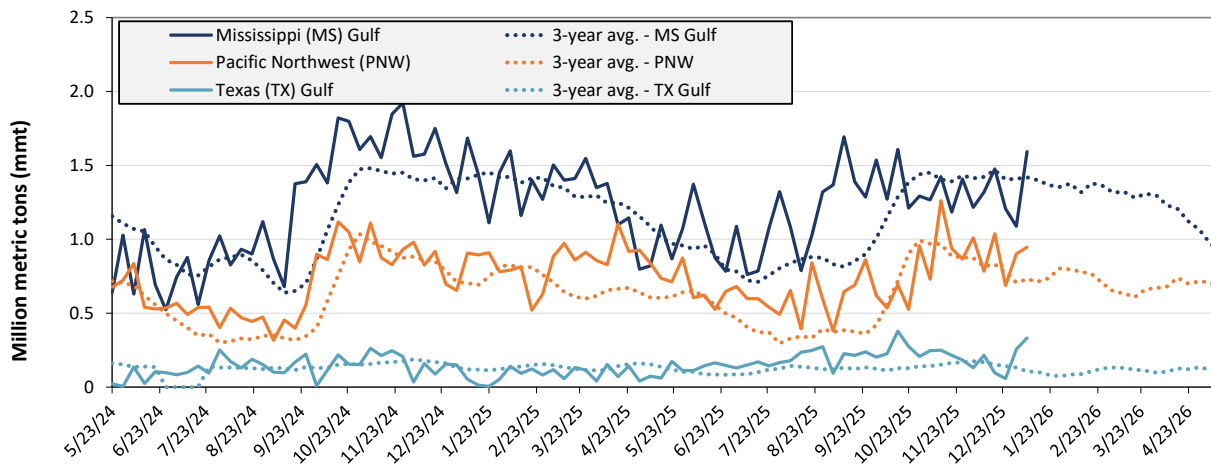
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending January 08: 3.5 mmt of grain inspected, up 27 percent from the previous week, up 20 percent from the same week last year, and up 24 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 01/08/26 inspections (mmt):

MS Gulf: 1.59

PNW: 0.95

TX Gulf: 0.33

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 46	up 30	up 43	up 5
Last year (same 7 days)	unchanged	up 504	up 17	up 27
3-year average (4-week moving average)	up 12	up 216	up 26	up 30

Source: USDA, Federal Grain Inspection Service.

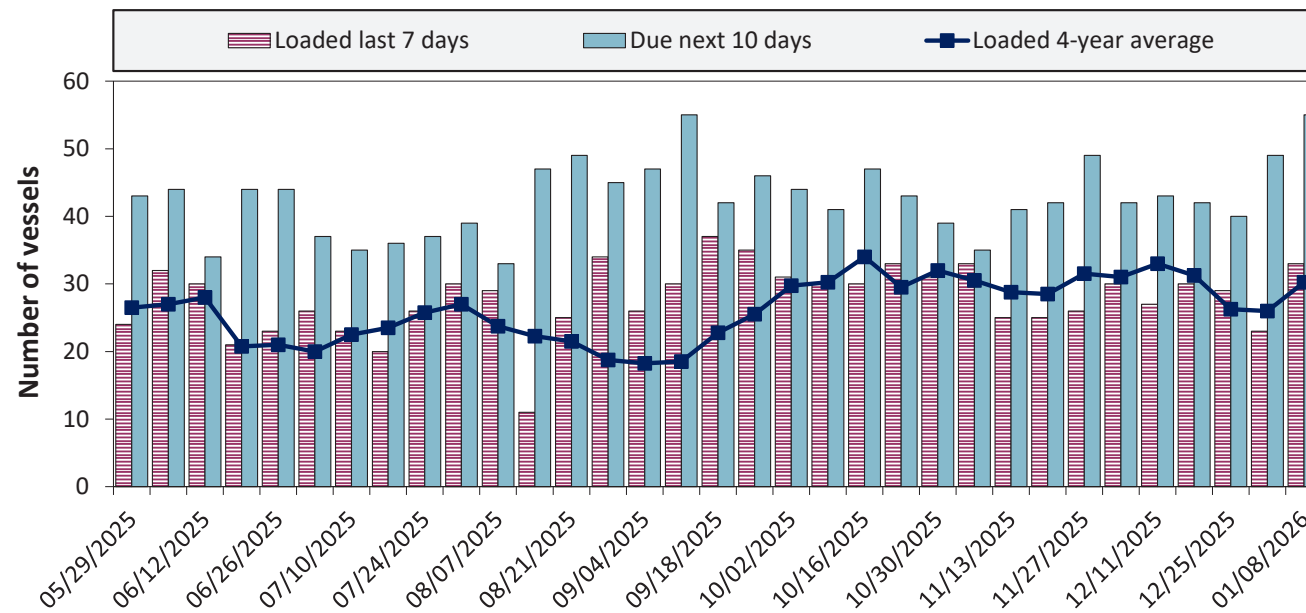
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
1/8/2026	25	33	55	16
1/1/2026	29	23	49	n/a
2025 range	(12...40)	(11...37)	(26...55)	(5...25)
2025 average	28	28	45	13

Note: The data are voluntarily submitted and may not be complete.

Source: USDA, Agricultural Marketing Service.

Figure 19. U.S. Gulf vessel loading activity

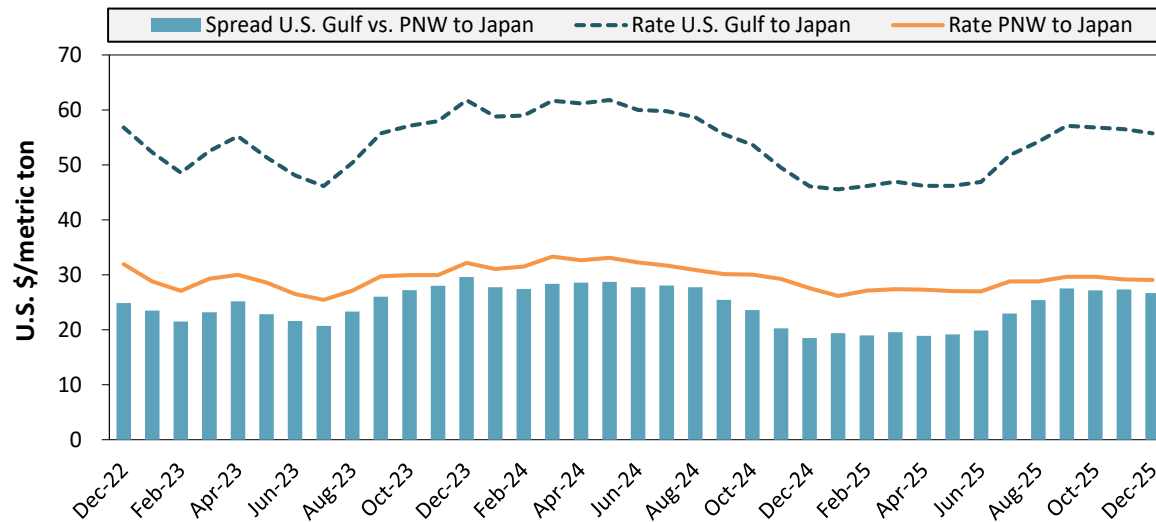


Week ending 01/08/26, number of vessels	Loaded	Due
Change from last year	18%	25%
Change from 4-year average	9%	5%

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%

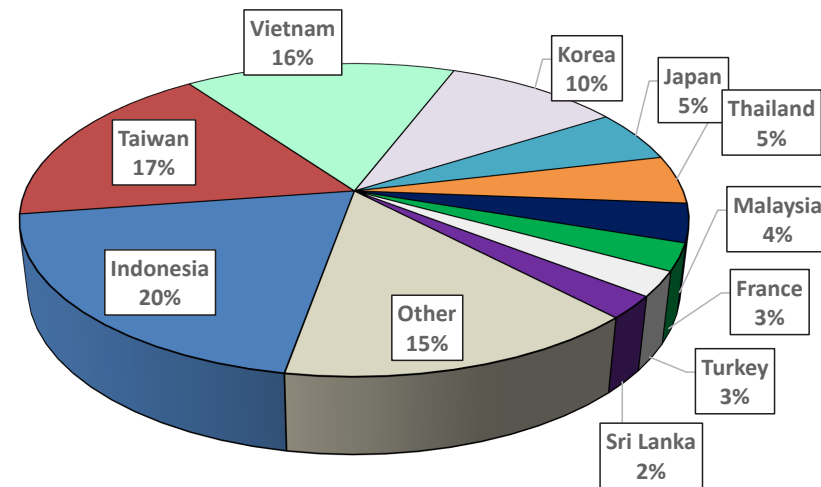
Table 20. Ocean freight rates for selected shipments, week ending 01/10/2026

Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy grain	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	Jan 8, 2026	Mar 1/31, 2026	66,000	35.00
Brazil	China	Heavy grain	Jan 9, 2026	Jan 18/22, 2026	63,000	39.00
Brazil	China	Heavy grain	Jan 8, 2026	Jan 1/10, 2026	66,000	33.00

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.

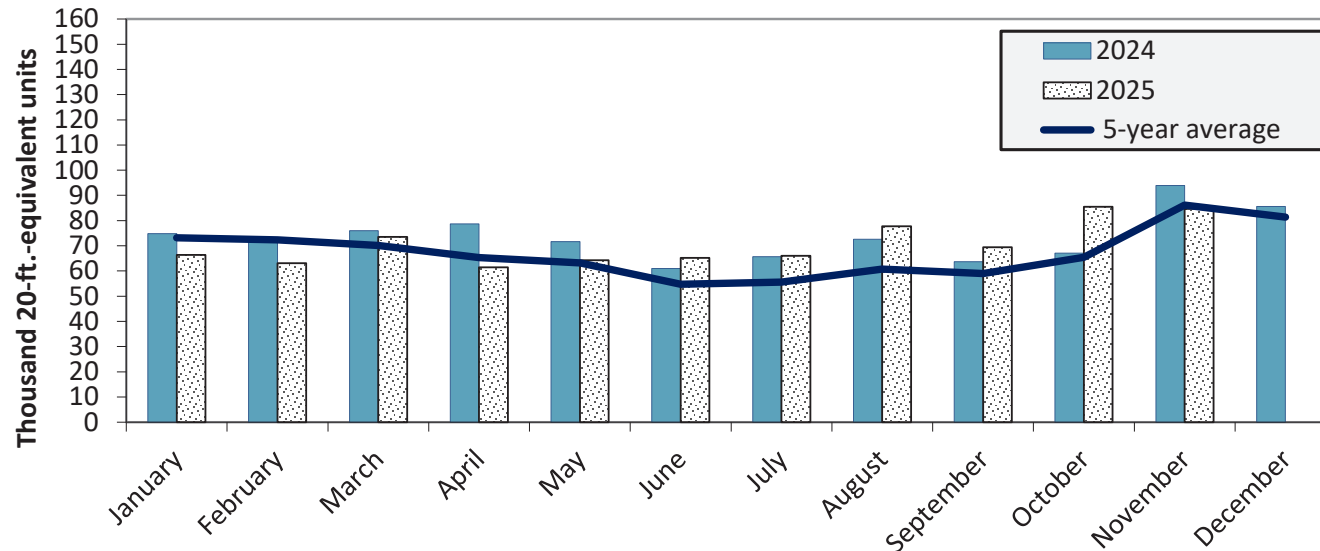
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Nov 2025



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 November 2025 were down 10.0 percent from last year and down 1.8 percent from the 5-year average.

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

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

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Additional Transportation Research and Analysis resources include the [Grain Truck and Ocean Rate Advisory \(GTOR\)](#), the [Mexico Transport Cost Indicator Report](#), and the [Brazil Soybean Transportation Report](#).

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