



Grain Transportation Report

Contents

Weekly Highlights.....	2
Snapshots by Sector.....	3
Feature Article.....	4
Grain Transportation Indicators	7
Rail Transportation.....	9
Barge Transportation.....	17
Truck Transportation	21
Grain Exports	22
Ocean Transportation.....	26
Contacts and Links.....	29

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BNSF's Agricultural Business Unit Touts 2025 Achievements. A [recent post](#) on BNSF Railway's (BNSF) website highlights the achievements of the firm's agricultural business unit in 2025.

In 2025, BNSF broke its previous 2018 record for corn volumes moved—largely on the strength of corn exports from Pacific Northwest (PNW) export terminals. Corn [export inspections](#) from the PNW totaled 24.2 million metric tons (mmt) in 2025—an all-time record and up 128 percent from the prior 5-year average.

Despite the rise in PNW-route corn exports, BNSF contended with low soybean export demand out of the PNW because of U.S.-China trade negotiations. Absent demand for PNW-route soybean exports in the early fall, BNSF directed soybean traffic to the Texas Gulf, where soybean export inspections totaled 1.2 mmt, from October to November—well above average ([GTR, January 1, 2026](#)).

BNSF's website post also highlights the opening of new facilities in 2025—including a grain elevator in Hager City, WI; a grain elevator/fertilizer plant in Courtland, KS; and a renewable fuel facility in San Bernadino, CA.

CHS Upgrades Fertilizer Import Terminal in Galveston, TX. CHS Inc. recently [announced](#) the completed upgrades of its fertilizer-receiving terminal at the Port of Galveston, TX. Done in two phases, over the course of 2 years, the upgrades will allow CHS

to handle more than one type of cargo and to load trains faster: with upgrades to the terminal's conveyor systems, rail car loading speeds will triple (from 400 tons per hour (tph) to 1,200 tph).

According to the [Fertilizer Transportation Dashboard](#) on AgTransport, the Houston-Galveston, TX, customs district received 1.4 million (short) tons of fertilizer imports in 2025—down 26 percent from 2024 and down 23 percent from the prior 5-year average. The dashboard also includes rail freight rates. From Galveston, the current rail freight rate (for a 100-car unit train) to Kershaw, MT, is \$71.54 per ton and to Friona, TX, \$40.49 per ton.

UP-Served Grain Elevator Begins Operations in South-Central Iowa.

Last month, Heartland Cooperative's new 5.5-million bushel grain elevator, in Millerton, IA, [loaded its first shuttle train](#) for shipment on Union Pacific Railroad (UP). Located in South-Central Iowa, the new facility is on UP's Trenton Subdivision. The next closest shuttle-loading elevator to the new facility is a BNSF-served facility about 35 miles northwest (in Osceola, IA).

According to [data from the Surface Transportation Board](#), UP carried 47,705 grain carloads from Iowa in 2025—just under half of the total Class I grain carloads that originated from Iowa. Most of UP's Iowa grain carloads are from elevators in the northern half of the State (not south, where the new facility in Millerton is located).



Bruce Leighty - 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 February 26, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2025/26 totaled 39.57 million metric tons (mmt), down 1 percent from last week and up 18 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26 were 2.02 mmt, up 195 percent from last week. Net [soybean export sales](#) were 0.38 mmt, down 6 percent from last week. Net [wheat export sales](#) were 0.20 mmt, down 16 percent from last week.

Rail

U.S. Class I railroads originated 28,838 [grain carloads](#) during the week ending February 21. This was a 15-percent decrease from the previous week, 46 percent more than last year, and 22 percent more than the 3-year average.

Average March [shuttle secondary railcar bids/offers](#) (per car) were \$350 above tariff for the week ending February 26. This was \$125 more than last week and \$128 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$29 above tariff. This was \$7 more than last week and \$283 lower than this week last year.

Barge

For the week ending February 28, [barged grain movements](#) totaled 579,122 tons. This was 16 percent more than the previous week and 37 percent more than the same week last year.

For the week ending February 28, 406 [barges moved down river](#), 79 more than the previous week. There were 835 grain barges unloaded in the New Orleans region, 8 percent more than the previous week.

Ocean

For the week ending February 26, 34 [oceangoing grain vessels](#) were loaded in the Gulf—26 percent more than the same period last year. Within the next 10 days (starting February 27), 48 vessels were expected to be loaded—14 percent more than the same period last year.

As of February 26, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$54.50, nearly unchanged from the previous week. The rate from the Pacific Northwest to Japan was \$31.25 per mt, up 2 percent from the previous week.

Fuel

For the week ending March 2, the [U.S. average diesel fuel price](#) increased 8.8 cents from the previous week to \$3.897 per gallon, 26.2 cents above the same week last year.



Review of Ethanol in 2025: Production, Transportation, and Exports

In 2025, U.S. ethanol production rose 2 percent from 2024 and rose 8 percent from the prior 5-year average. As a result of these rises, [Class I ethanol rail movements](#) were up 1 percent from 2024 and up 10 percent from the prior 5-year average. Largely because of strong sales to countries with domestic ethanol blending mandates, 2025 ethanol exports were up 13 percent from 2024 and up 52 percent from the 5-year average.

For both 2025 and future projections, this article examines ethanol production and exports. The article also considers how these factors affect demand (or potential demand) for ethanol transportation.¹

Ethanol Production and Rail Movements

In 2025, high ethanol production was buoyed by high corn production, increased efficiency of ethanol production, and strong international demand for ethanol. Of total ethanol production, 68 percent shipped by rail from the Midwest. Of Midwest-originated rail movements of fuel ethanol, 42 percent went to the East Coast district; 28 percent, to the Gulf Coast district; 18 percent, to the West Coast district; 2 percent, to the Rocky Mountain district; 5 percent, to Canada; and 5 percent, to elsewhere in the Midwest district.²

In the first half of 2025, ethanol production was up 2 percent from the same 2024 period and up 8 percent from the 5-year average for the period. With the rise in ethanol production, [Class I ethanol rail movements](#) were also up 4 percent from the same 2024 period and up 13 percent from the 5-year average for the period (fig. 1).

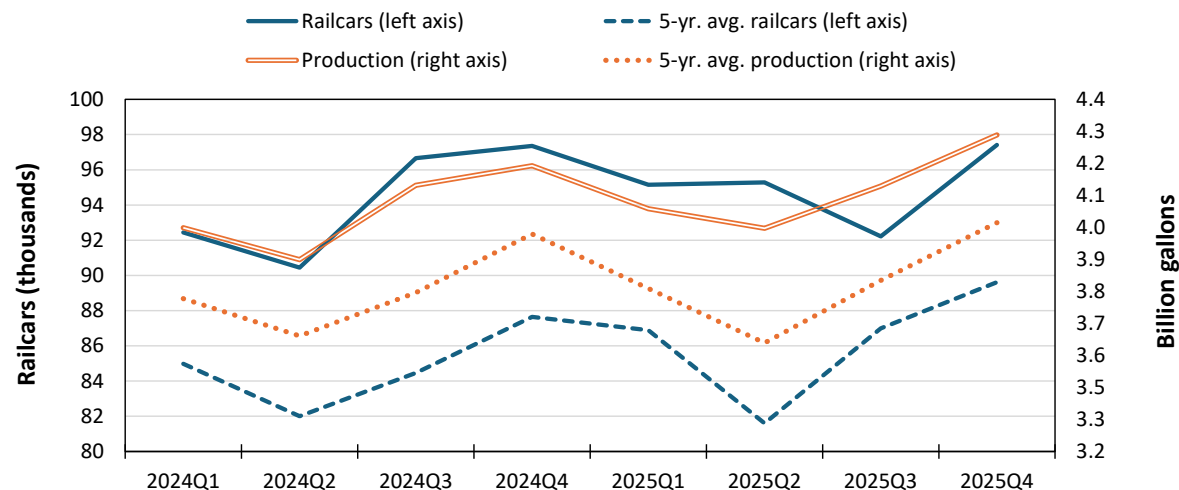
In the second half of 2025, though ethanol production was up 1 percent and exports were up 12 percent from the same period in 2024, rail movements were down 2 percent from the same period in 2024. That exports rose while rail movements declined suggests that some ethanol shipments may have been diverted to truck and barge.

Ethanol Exports

Exports were 15 percent of the [total demand for U.S. ethanol](#) in 2025. According to USDA's Foreign Agricultural Service (FAS) data, strong sales to key markets raised U.S. ethanol exports in 2025. At 2.18 billion gallons, 2025 ethanol exports were up 13 percent from last year and up 52 percent from the 5-year average.

Top Five Buyers of U.S. Ethanol In 2025. In 2025, sales to the top five buyers (in descending order of purchases)—Canada, the Netherlands, India, the United Kingdom (UK), and Colombia—accounted for 76 percent of total U.S. ethanol exports. From 2024 to 2025,

Figure 1. Ethanol rail shipments and production



Note: Avg. = Average

Source: Energy Information Administration.

¹ "Ethanol transportation" refers to transportation used to convey ethanol—not transportation powered by ethanol.

² More technically, EIA's geographic designations are called Petroleum Administration for Defense [Districts or PADDs](#).

ethanol-export volumes to three of the top five buyers rose as follows: the Netherlands (+160 percent); Canada (+14 percent); and India (+4 percent). Of total U.S. ethanol exports in 2025, Canada accounted for 36 percent (792 million gallons) and the Netherlands, for 17 percent—up from just 7 percent in 2024.

A U.S.-UK trade agreement finalized in May 2025 eliminated the UK's 19-percent import tariff on U.S. ethanol through an annual 370-million-gallon import quota that incentivizes increased exports to the UK. Despite the agreement, U.S. exports to the UK were just over 177 million gallons in 2025—down 27 percent from 2024 (but up 66 percent from the prior 5-year average). If the UK's quota is met in the future, that rise in exports to the UK could increase rail movements from the Midwest to the Gulf region, as well as drive more activity at the Port of Houston, the main gateway for ethanol exports to the UK.

U.S. ethanol exports to Colombia were down 7 percent from 2024, but up 92 percent from the 5-year average. Colombia maintained its place as the fifth-largest buyer.

Ethanol Blending Mandates. Strong U.S. ethanol purchases by Canada, the UK, EU, and Colombia were supported by mandated gasoline blends in those countries, ranging from E5 (5-percent ethanol) to E20 (20-percent ethanol). India is rapidly raising its mandate to E20, with plans for higher blends (E30) [by 2030](#). The Netherlands mandates E10, as the

standard gasoline grade to reduce emissions. While Canada's national renewable fuel requirement for gasoline is E5, some provinces have stricter standards: for example, Ontario and Quebec [had mandates for 11 percent and 12 percent](#) respectively in 2025. Finally, Colombia mandates a variable blend rate, often fluctuating between [E4 and E10](#) in recent years.

Port of Houston Remains Top Port of Exit. U.S. port activity reflects the shifting dynamics of the top destinations for U.S. ethanol. As the top port of exit for U.S. ethanol exports in 2025, the Port of Houston handled 52 percent of exports by volume (up 4 percentage points from 2024), because of rising volumes to India and the Netherlands (fig. 2). From 2024 to 2025, export shares rose for all ports (unchanged for Laredo, TX), except New Orleans, Pembina, and "Other" ports.

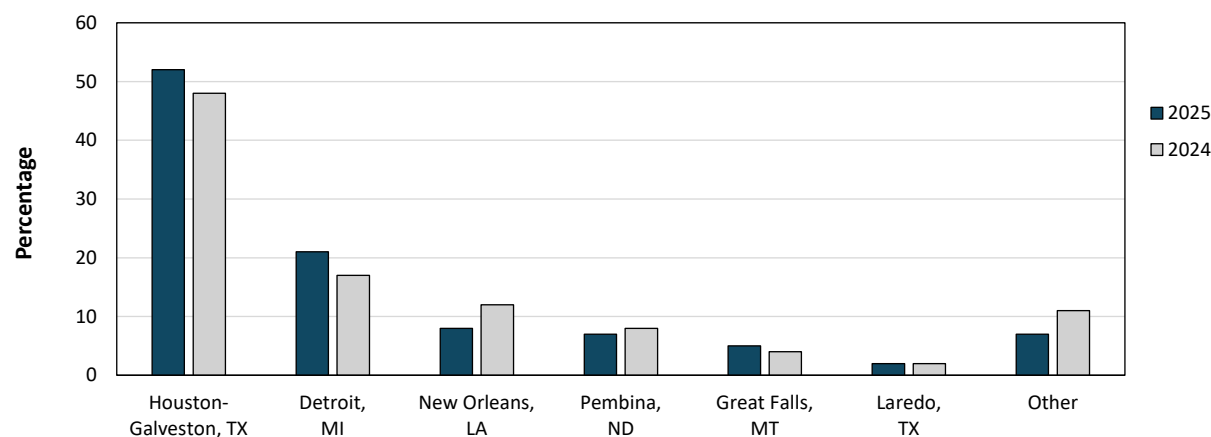
The Port of Houston's share rose mainly because of strong purchases by the Netherlands, while strong purchases by Canada boosted the Port of Detroit's share. The Port of New Orleans's share fell 4 percentage points because of lower exports to the UK. Similarly, the Port of Pembina's share declined with reduced shipments to Canada from this port (despite the overall rise in U.S. ethanol exports to Canada). The 4-percentage-point decline in exports from "Other" ports owed to a drop in the Port of Seattle's share, because of that port's decreased exports to Canada.

Looking Ahead

Ethanol Production in 2026 and 2027.

According to the U.S. Energy Information Administration's (EIA) February [Short-Term Energy Outlook](#), U.S. consumption of fuel

Figure 2. Top ports for U.S. ethanol exports



Source: USDA, Foreign Agricultural Service.

ethanol blended into motor gasoline will average 930,000 barrels per day in 2026 and 2027, unchanged from 2025.

EIA projects ethanol production will average 1.08 million barrels per day in 2026 (up from 1.07 million barrels in 2025) and 2027.

According to USDA's February [World Agricultural Supply and Demand Estimates](#) report, from marketing year (MY) 2024/25 to MY 2025/26, corn use for ethanol is projected to increase 3 percent.

Ethanol Exports for FY 2026. U.S. ethanol exports are expected to reach a record-high [\\$4.7 billion](#) in fiscal year (FY) 2026, adjusted up from the December estimate (in USDA's [Outlook for U.S. Agricultural Trade](#)) of \$4.6 billion and up 2 percent from the FY 2025 total.

Additionally, EIA expects U.S. ethanol exports to remain near record highs in 2026—150 million barrels per day, up from 140 million barrels per day in 2025. This forecast is based on [record-high corn production](#) harvested this past fall, as well as [domestic ethanol](#)

[consumption](#) that is anticipated to stay below pre-pandemic levels as motor gasoline consumption remains flat. EIA expects the top ethanol buyers to continue to import substantial U.S. ethanol volumes because of their blending mandates.

Strong purchases from the top five (and other) buyers of U.S. ethanol could boost export transportation demand, particularly for rail.

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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.

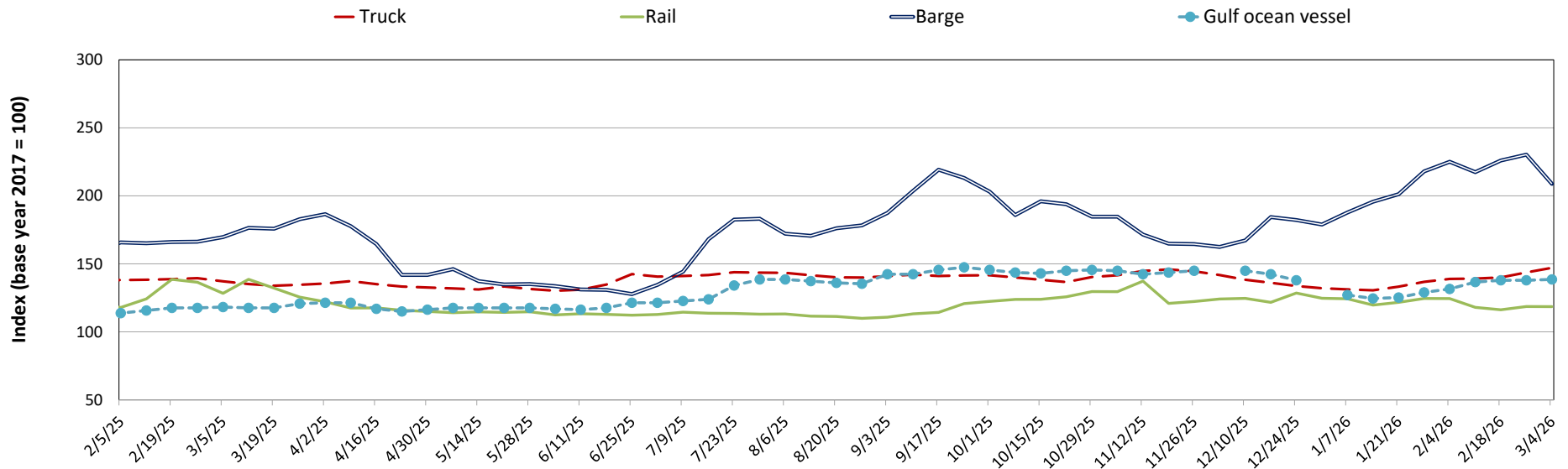
Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
03/04/26	147	119	209	139	148
02/25/26	144	119	230	138	145
03/05/25	137	128	170	118	131

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.

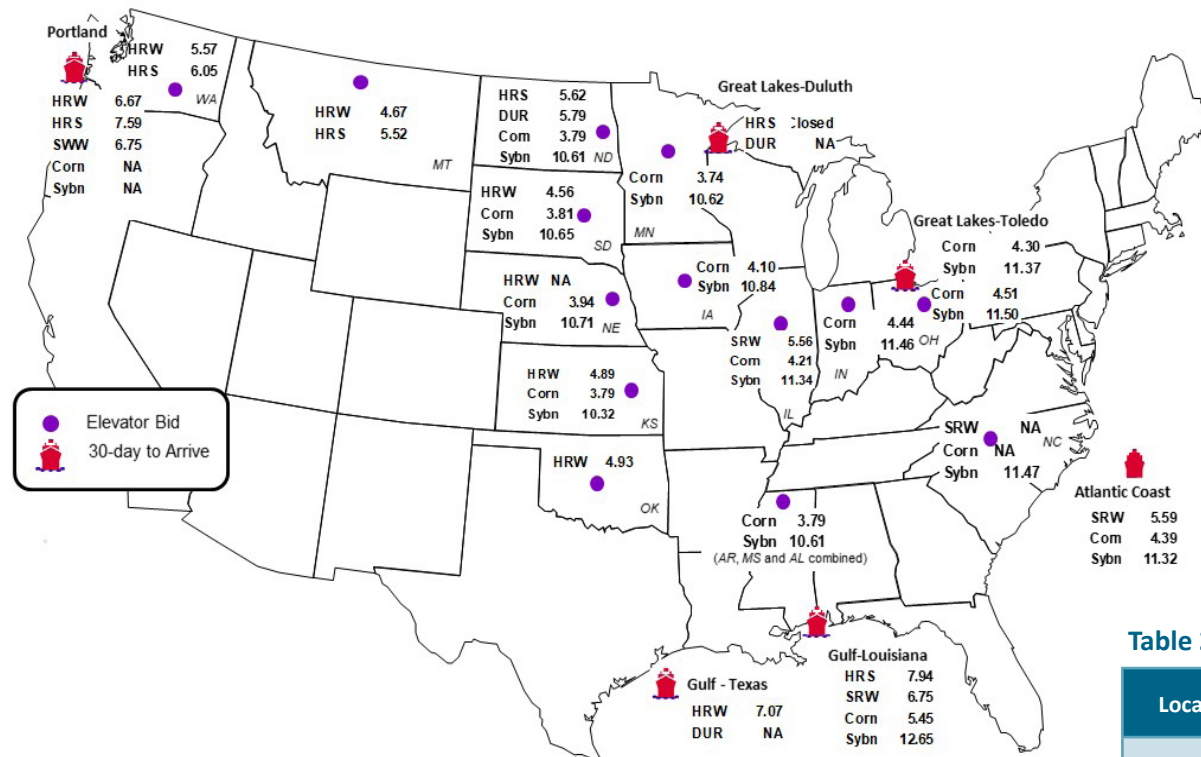
Figure 1. Grain transportation cost indicators as of week ending 3/4/26



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	2/27/2026	2/20/2026
Corn	IL-Gulf	-1.24	-1.20
Corn	NE-Gulf	-1.51	-1.48
Soybean	IA-Gulf	-1.81	-1.78
HRW	KS-Gulf	-2.18	-2.42
HRS	ND-Portland	-1.97	-2.20

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	2/27/2026	Week ago 2/20/2026	Year ago 2/28/2025
Kansas City	Wheat	Mar	5.806	5.850	5.742
Minneapolis	Wheat	Mar	5.993	5.873	5.976
Chicago	Wheat	Mar	5.914	5.800	5.562
Chicago	Corn	Mar	4.486	4.398	4.654
Chicago	Soybean	Mar	11.706	11.532	10.176

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.

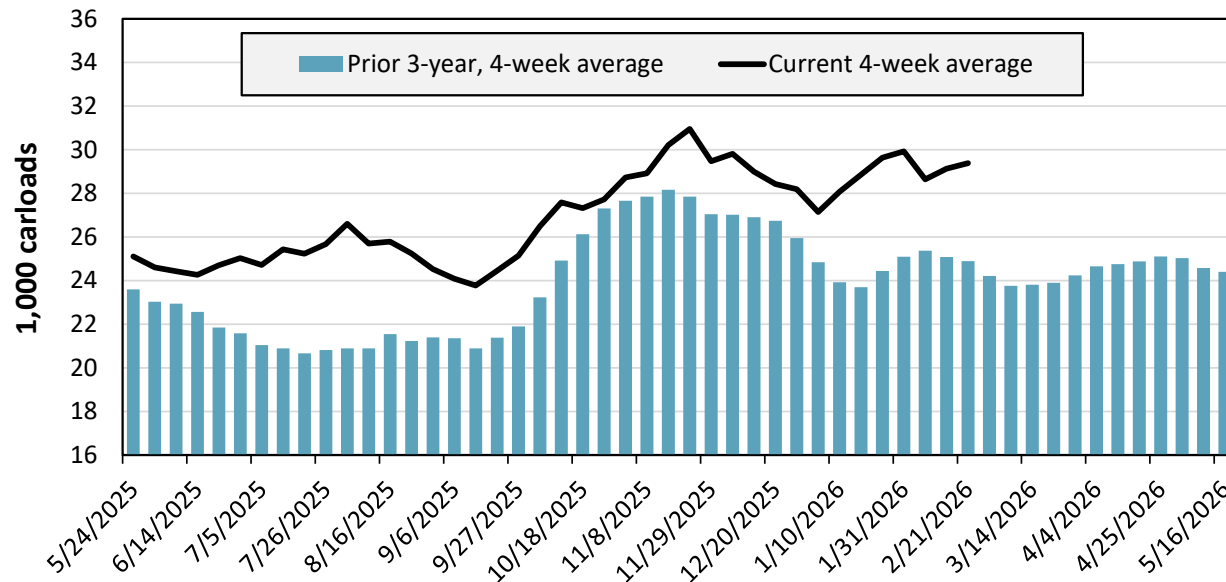
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 2/21/2026	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,586	2,415	13,359	7,103	3,095	1,280	28,838
This week last year	1,191	2,407	7,542	5,234	2,364	964	19,702
2026 YTD	10,825	18,775	91,806	50,874	25,275	11,944	209,499
2025 YTD	13,974	23,499	81,169	42,941	18,537	10,218	190,338
2026 YTD as % of 2025 YTD	77	80	113	118	136	117	110
Last 4 weeks as % of 2025	81	87	137	129	151	122	125
Last 4 weeks as % of 3-yr. avg.	76	92	126	127	127	111	118
Total 2025	81,717	140,116	608,958	313,968	157,757	79,502	1,382,018

Note: The last 4-week percentages compare the most recent 4 weeks of data to the analogous 4 weeks from the prior year and to the analogous 4 weeks in the prior 3 years. 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 February 21, grain carloads were up 1 percent from the previous week, up 25 percent from last year, and up 18 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: 2/20/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	52.8	24.4	21.5	22.4	17.8	30.7	28.3
	Average over last 4 weeks	39.6	26.9	26.4	21.4	19.6	32.9	27.8
	Average of same 4 weeks last year	27.6	34.4	53.6	18.8	6.6	n/a	28.2
Average grain unit train speeds (miles per hour)	This week	23.6	21.0	24.9	23.4	23.1	19.0	22.5
	Average over last 4 weeks	23.8	19.8	24.9	23.5	22.8	19.5	22.4
	Average of same 4 weeks last year	21.8	19.1	24.3	22.1	23.0	n/a	22.1

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

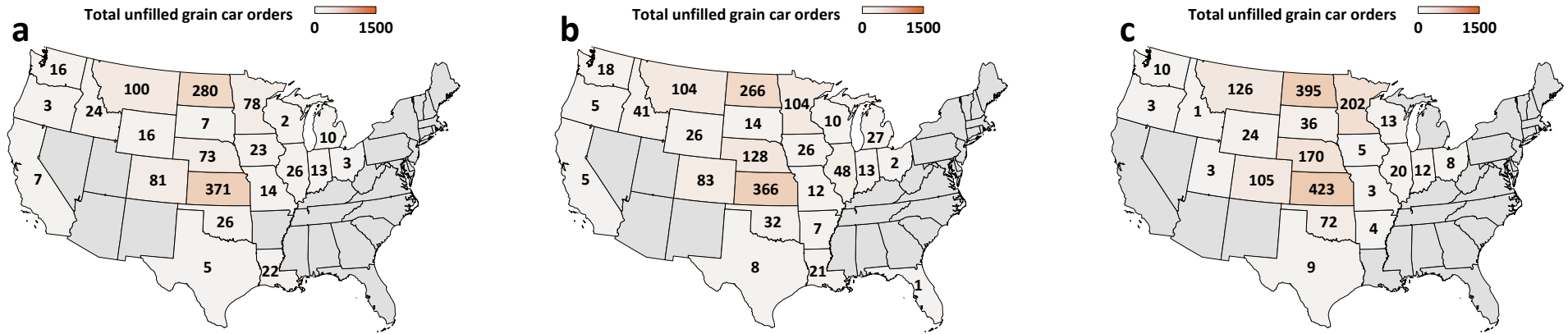
For the week ending: 2/20/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	34	6	321	64	6	241	671
	Average over last 4 weeks	55	10	338	56	17	302	777
	Average of same 4 weeks last year	58	7	729	96	13	n/a	902
Average number of loaded grain cars not moved in over 48 hours	This week	22	135	447	45	53	461	1,163
	Average over last 4 weeks	38	171	605	44	38	643	1,538
	Average of same 4 weeks last year	80	242	1,381	83	10	n/a	1,795
Average number of grain unit trains held	This week	0	0	4	6	1	4	15
	Average over last 4 weeks	0	0	4	5	1	4	15
	Average of same 4 weeks last year	0	1	40	7	0	n/a	48
Total unfilled manifest grain car orders	This week	27	0	524	568	0	81	1,200
	Average over last 4 weeks	52	0	572	611	0	131	1,365
	Average of same 4 weeks last year	21	1	563	779	0	n/a	1,363

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](#).

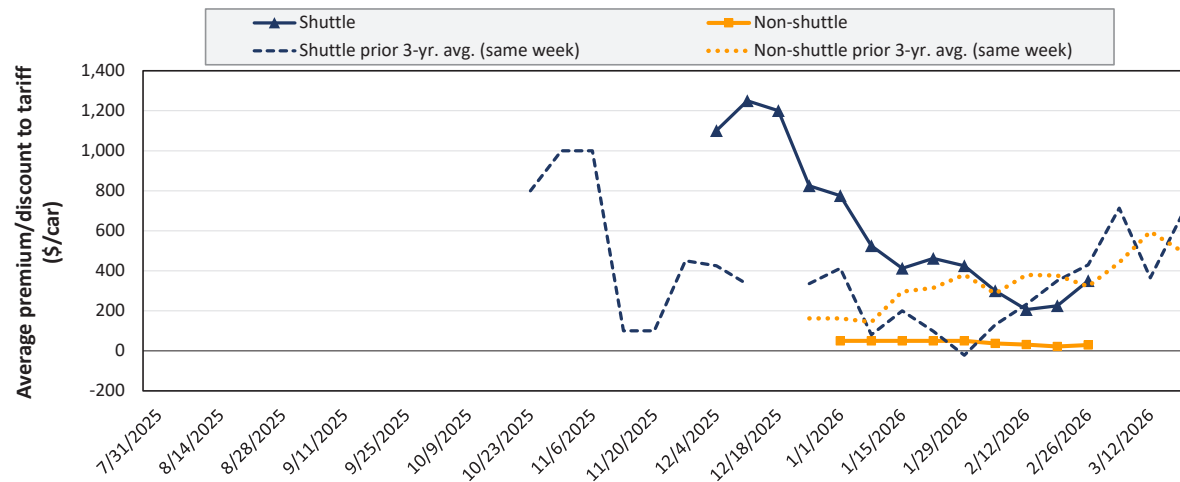
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 2/20/2026 (a); average over last 4 weeks (b); and average over same 4 weeks last year (c)



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 March 2026



Average non-shuttle bids/offers rose \$7 this week, and are \$21 below the peak.

Average shuttle bids/offers rose \$125 this week and are \$900 below the peak.

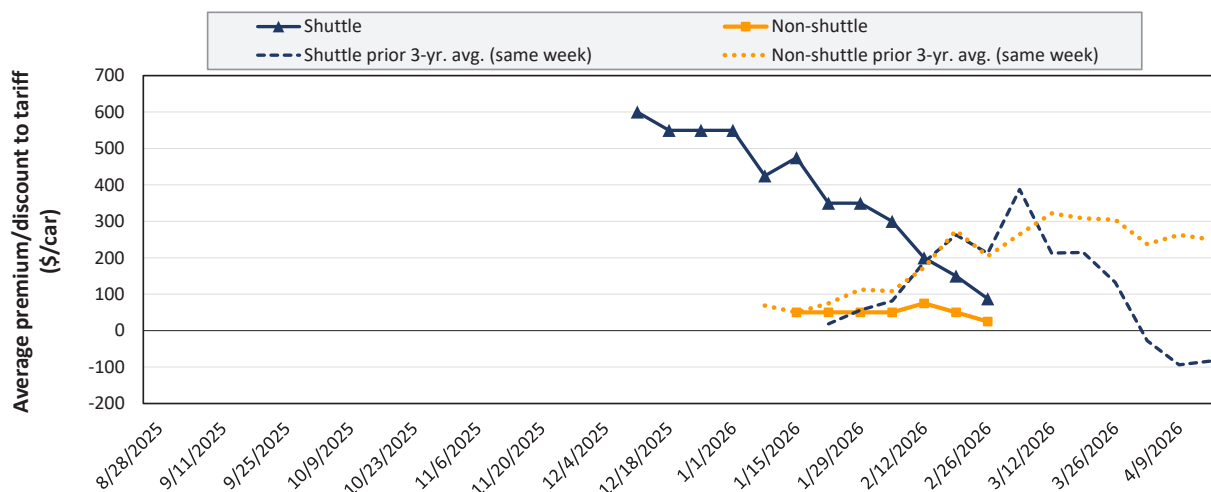
2/26/2026	BNSF	UP
Non-Shuttle	\$33	\$25
Shuttle	\$300	\$400

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 April 2026



Average non-shuttle bids/offers fell \$25 this week, and are \$50 below the peak.

Average shuttle bids/offers fell \$63 this week and are \$513 below the peak.

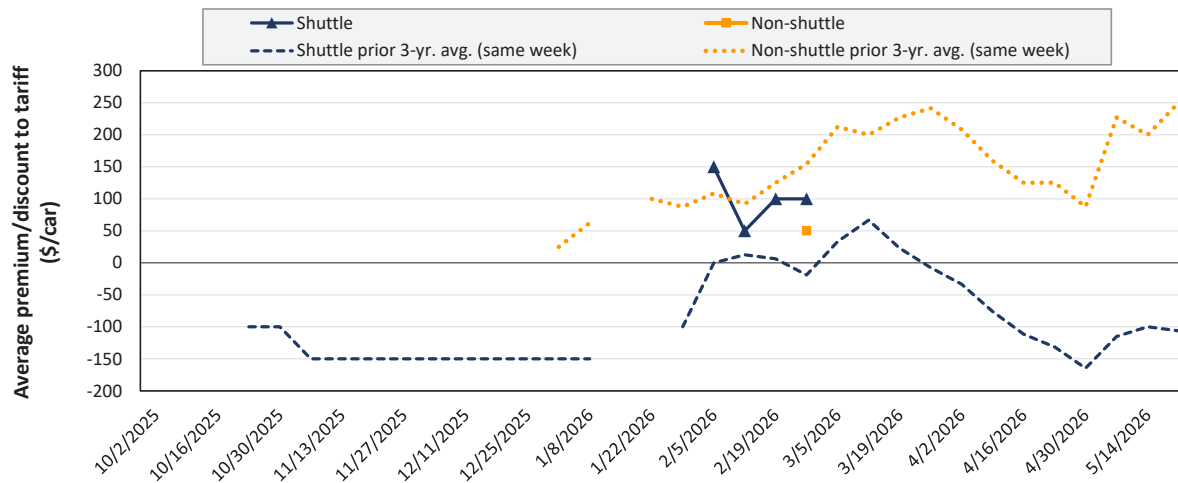
2/26/2026	BNSF	UP
Non-Shuttle	\$25	\$25
Shuttle	\$175	\$0

Note: Shuttle bids/offers are for shuttle trains—90+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service.

n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.

Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

Figure 8. Secondary market bids/offers for railcars to be delivered in May 2026



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

Average shuttle bids/offers are unchanged this week and are \$50 below the peak.

2/26/2026	BNSF	UP
Non-Shuttle	\$50	n/a
Shuttle	\$100	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. 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: 2/26/2026		Delivery period					
		Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26
Non-shuttle	BNSF	33	25	50	n/a	n/a	n/a
	Change from last week	-17	-25	n/a	n/a	n/a	n/a
	Change from same week 2025	-442	-275	-250	n/a	n/a	n/a
	UP	25	25	n/a	n/a	n/a	n/a
	Change from last week	31	-25	n/a	n/a	n/a	n/a
	Change from same week 2025	-125	-50	n/a	n/a	n/a	n/a
Shuttle	BNSF	300	175	100	75	n/a	n/a
	Change from last week	50	25	0	-25	n/a	n/a
	Change from same week 2025	-619	-125	50	n/a	n/a	n/a
	UP	400	0	n/a	n/a	n/a	n/a
	Change from last week	200	n/a	n/a	n/a	n/a	n/a
	Change from same week 2025	364	100	n/a	n/a	n/a	n/a
	CPKC	75	100	100	n/a	n/a	n/a
	Change from last week	-225	0	0	n/a	n/a	n/a
	Change from same week 2025	-25	n/a	-50	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, March 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	\$71.22	\$5,903.22	\$1.60	\$58.62	2.7
	BNSF	Williston, ND	Superior, WI	Shuttle	\$4,291	\$36.66	\$4,327.66	\$1.17	\$42.98	4.2
	CPKC	Westby, MT	St. Louis, MO	Unit	\$5,788	\$480.37	\$6,268.37	\$1.69	\$62.25	3.4
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	\$4,804	\$42.66	\$4,846.66	\$1.31	\$48.13	3.7
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	\$6,215	\$90.06	\$6,305.06	\$1.70	\$62.61	2.3
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	\$2,865	\$17.64	\$2,882.64	\$0.78	\$28.63	7.0
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	\$5,732	\$91.74	\$5,823.74	\$1.57	\$57.83	4.3
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	\$5,838	\$76.02	\$5,914.02	\$1.60	\$58.73	2.6
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	\$5,412	\$62.28	\$5,474.28	\$1.48	\$54.36	3.0
	CPKC	Minot, ND	Kalama, WA	Unit	\$5,298	\$425.32	\$5,723.32	\$1.55	\$56.84	-3.3
	CPKC	Nekoma, ND	Chicago, IL	Manifest	\$5,030	\$255.61	\$5,285.61	\$1.43	\$52.49	4.0
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	\$3,400	\$38.28	\$3,438.28	\$0.93	\$34.14	-12.1
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	\$3,600	\$33.78	\$3,633.78	\$0.98	\$36.09	-14.6
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	\$5,800	\$114.00	\$5,914.00	\$1.60	\$58.73	-14.1
	BNSF	Garden City, KS	San Bernardino, CA	DET	\$5,700	\$82.56	\$5,782.56	\$1.56	\$57.42	-1.4
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,200	\$51.54	\$4,251.54	\$1.15	\$42.22	-12.7
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,000	\$45.42	\$4,045.42	\$1.09	\$40.17	-13.6
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	\$3,500	\$51.84	\$3,551.84	\$0.96	\$35.27	-15.0
	BNSF	Wichita, KS	Chicago, IL	DET	\$3,700	\$37.98	\$3,737.98	\$1.01	\$37.12	-12.7
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	\$3,900	\$38.28	\$3,938.28	\$1.06	\$39.11	-12.0
	UP	Byers, CO	Houston, TX	Shuttle	\$4,525	\$337.27	\$4,862.27	\$1.31	\$48.28	-8.0
	UP	Goodland, KS	Kansas City, MO	Manifest	\$4,967	\$126.15	\$5,093.15	\$1.38	\$50.58	1.6
	UP	Medford, OK	Houston, TX	Shuttle	\$3,775	\$166.46	\$3,941.46	\$1.07	\$39.14	-9.5
	UP	Salina, KS	Houston, TX	Shuttle	\$4,025	\$221.85	\$4,246.85	\$1.15	\$42.17	-8.9
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	\$4,791	\$46.32	\$4,837.32	\$1.31	\$48.04	3.6
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	\$4,439	\$45.48	\$4,484.48	\$1.21	\$44.53	3.9
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	\$2,032	\$19.98	\$2,051.98	\$0.55	\$20.38	-0.6
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, March 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	\$63.96	\$5,663.96	\$1.43	\$56.25	-4.1
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	\$5,470	\$101.04	\$5,571.04	\$1.41	\$55.32	-1.2
	BNSF	Edison, NE	Hanford, CA	Railroad	\$5,460	\$106.56	\$5,566.56	\$1.40	\$55.28	-9.9
	BNSF	Edison, NE	Hereford, TX	Railroad	\$4,500	\$43.68	\$4,543.68	\$1.15	\$45.12	-11.1
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	\$5,350	\$105.54	\$5,455.54	\$1.38	\$54.18	-1.3
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	\$4,620	\$56.10	\$4,676.10	\$1.18	\$46.44	0.5
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	\$4,260	\$45.84	\$4,305.84	\$1.09	\$42.76	-11.7
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	\$4,000	\$56.22	\$4,056.22	\$1.02	\$40.28	-12.5
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	\$5,430	\$85.14	\$5,515.14	\$1.39	\$54.77	-1.0
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	\$5,430	\$99.96	\$5,529.96	\$1.39	\$54.92	-1.2
	CN	Gibson City, IL	Reserve, LA	Private	\$2,301	\$276.66	\$2,577.66	\$0.65	\$25.60	3.3
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,681	\$276.66	\$2,957.66	\$0.75	\$29.37	2.8
	CPKC	Delhi, LA	Morton, MS	Railroad	\$1,342	\$42.00	\$1,384.00	\$0.35	\$13.74	-0.3
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,047	\$489.14	\$5,536.14	\$1.40	\$54.98	0.1
	CPKC	Glenwood, MN	Boardman, OR	Railroad	\$5,513	\$470.69	\$5,983.69	\$1.51	\$59.42	0.1
	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	\$200.39	\$4,135.39	\$1.04	\$41.07	-3.8
	UP	Frankfort, KS	Calipatria, CA	Railroad	\$5,855	\$455.88	\$6,310.88	\$1.59	\$62.67	-2.8
Soybeans	UP	Mead, NE	Keyes, CA	Railroad	\$6,015	\$503.73	\$6,518.73	\$1.64	\$64.73	-2.8
	UP	Nebraska City, NE	Amarillo, TX	Railroad	\$4,855	\$207.06	\$5,062.06	\$1.28	\$50.27	-3.1
	UP	Sloan, IA	Burley, ID	Railroad	\$5,535	\$341.04	\$5,876.04	\$1.48	\$58.35	-2.9
	UP	Sterling, IL	Nashville, AR	Railroad	\$4,075	\$209.67	\$4,284.67	\$1.08	\$42.55	-3.7
	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	\$6,135	\$91.68	\$6,226.68	\$1.68	\$61.83	-1.0
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	\$5,185	\$98.04	\$5,283.04	\$1.43	\$52.46	-22.9
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	\$6,085	\$88.14	\$6,173.14	\$1.67	\$61.30	-0.9
	BNSF	Casselton, ND	St. Louis, MO	Railroad	\$3,400	\$51.30	\$3,451.30	\$0.93	\$34.27	-24.5
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	\$6,185	\$97.44	\$6,282.44	\$1.70	\$62.39	-1.0
	CN	Gibson City, IL	Reserve, LA	Private	\$2,301	\$276.66	\$2,577.66	\$0.70	\$25.60	3.3
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,681	\$276.66	\$2,957.66	\$0.80	\$29.37	2.8
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,785	\$489.14	\$6,274.14	\$1.70	\$62.31	0.1
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	\$3,526	\$373.86	\$3,899.86	\$1.05	\$38.73	0.2
	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	\$216.63	\$3,866.63	\$1.05	\$38.40	-28.2
	UP	Cozad, NE	Kalama, WA	Railroad	\$5,140	\$452.98	\$5,592.98	\$1.51	\$55.54	-15.6
	UP	Cozad, NE	Houston, TX	Railroad	\$4,010	\$312.62	\$4,322.62	\$1.17	\$42.93	-26.0
	UP	Sloan, IA	Ama, LA	Railroad	\$4,090	\$356.99	\$4,446.99	\$1.20	\$44.16	-25.5

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, March 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	\$77	\$4,718	\$1.18	\$46.43	0.6%
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	\$5,080	\$450	\$5,530	\$1.38	\$54.43	-0.7%
	Council Bluffs, IA	Laredo, TX	CPKC	Non-shuttle	\$5,550	\$498	\$6,048	\$1.51	\$59.52	-0.7%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,005	\$429	\$5,434	\$1.36	\$53.48	-0.7%
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	\$5,190	\$456	\$5,646	\$1.41	\$55.57	-0.7%
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	\$4,535	\$370	\$4,905	\$1.23	\$48.28	-3.5%
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	\$4,655	\$385	\$5,040	\$1.26	\$49.60	-3.4%
	Superior, NE	El Paso, TX	BNSF	Shuttle	\$4,622	\$60	\$4,682	\$1.17	\$46.08	-8.2%
Soybeans	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	\$5,080	\$450	\$5,530	\$1.48	\$54.43	-0.7%
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	\$4,325	\$65	\$4,390	\$1.18	\$43.21	-19.2%
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	\$4,950	\$352	\$5,302	\$1.42	\$52.18	-20.0%
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	\$4,325	\$65	\$4,390	\$1.18	\$43.21	-19.2%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,005	\$429	\$5,434	\$1.46	\$53.48	-0.7%
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	\$5,035	\$369	\$5,404	\$1.45	\$53.19	-19.7%
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	\$3,000	\$47	\$3,047	\$0.82	\$29.99	-26.0%
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	\$2,800	\$47	\$2,847	\$0.76	\$28.02	-22.6%
	Great Bend, KS	Laredo, TX	UP	Shuttle	\$4,099	\$264	\$4,363	\$1.17	\$42.94	-9.3%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,005	\$429	\$5,434	\$1.46	\$53.48	-0.7%
	Wichita, KS	Laredo, TX	UP	Shuttle	\$4,024	\$233	\$4,257	\$1.14	\$41.90	-7.3%

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).

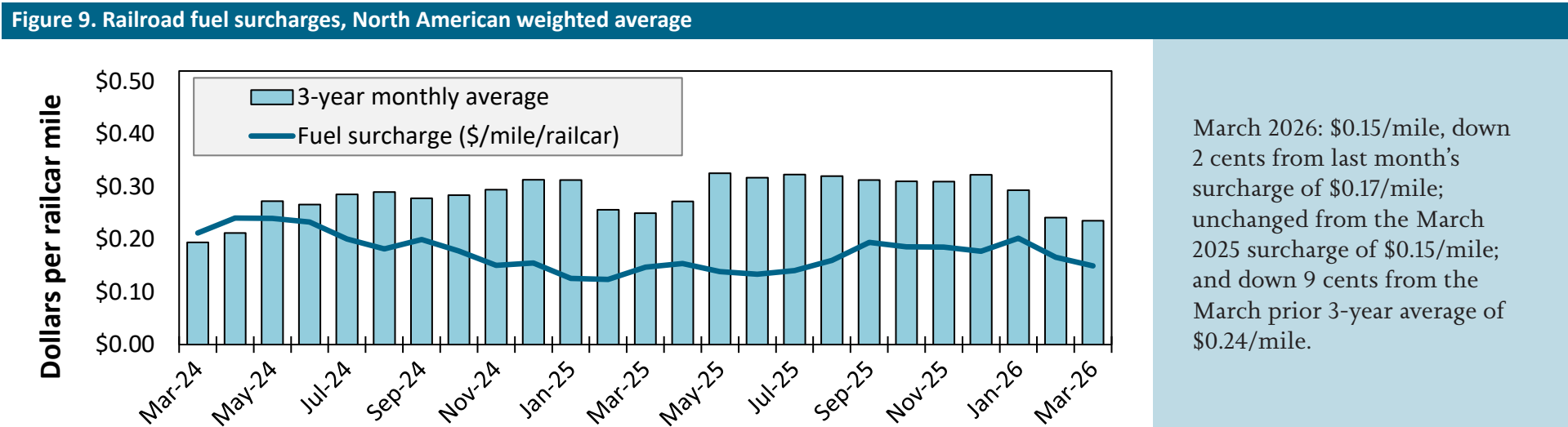
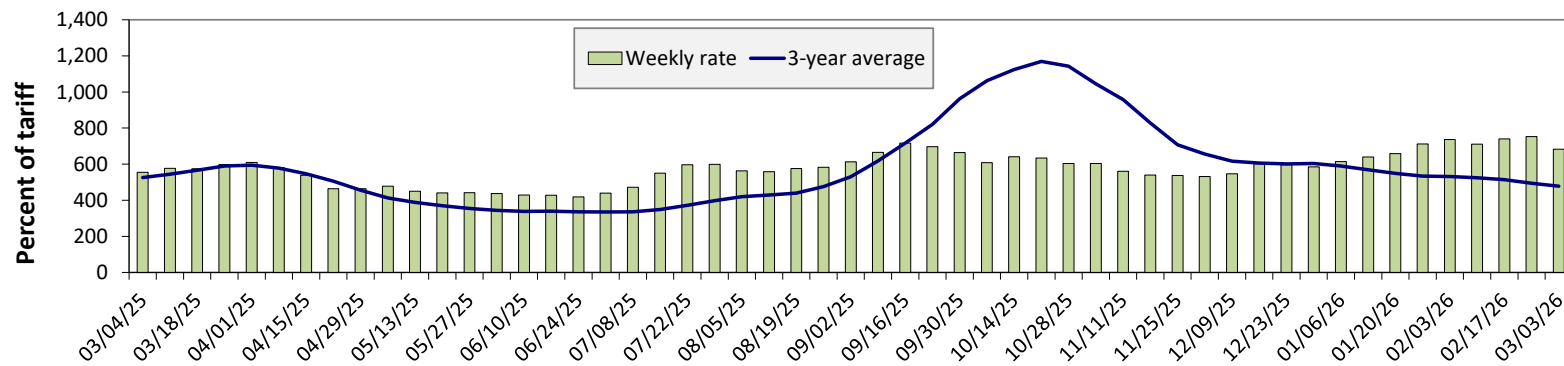


Figure 10. Illinois River barge freight rate



For the week ending March 3: 9 percent lower than the previous week; 23 percent higher than last year; and 43 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	3/3/2026	n/a	690	683	578	654	506
	2/24/2026	n/a	765	753	620	704	561
\$/ton	3/3/2026	n/a	36.71	31.69	23.06	30.67	15.89
	2/24/2026	n/a	40.70	34.94	24.74	33.02	17.62
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	28	23	26	36	45
	3-year avg.	n/a	41	43	52	52	61
Rate	April	650	600	572	467	476	416
	June	595	539	498	420	456	369

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](#).

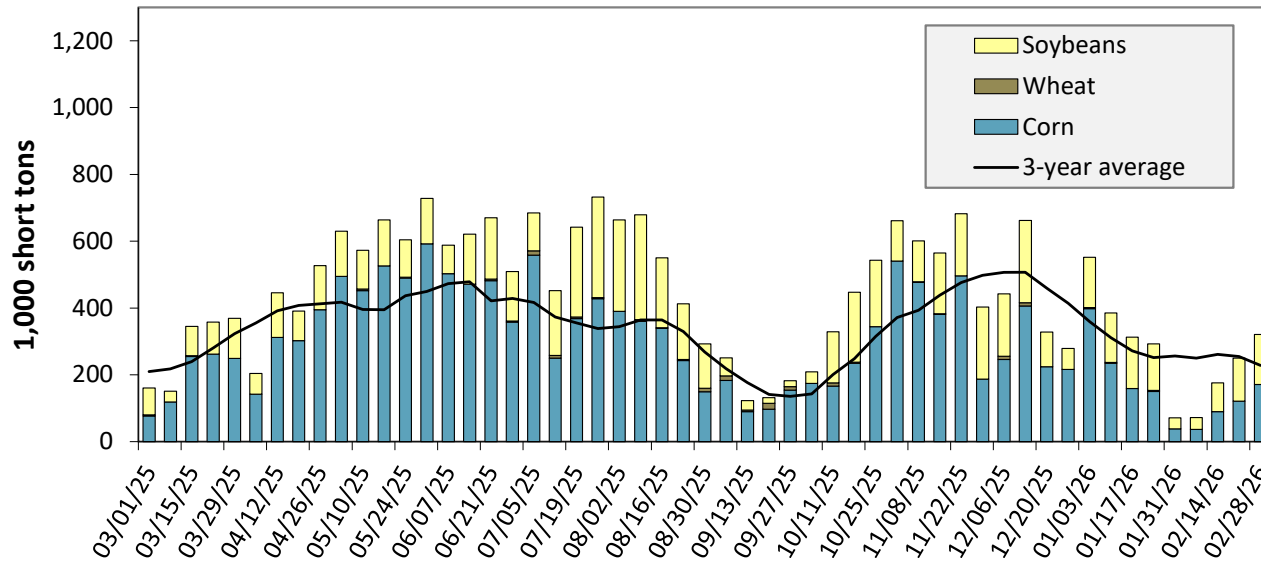
Source: USDA, Agricultural Marketing Service.

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 February 28:
99 percent higher than last year and
41 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.

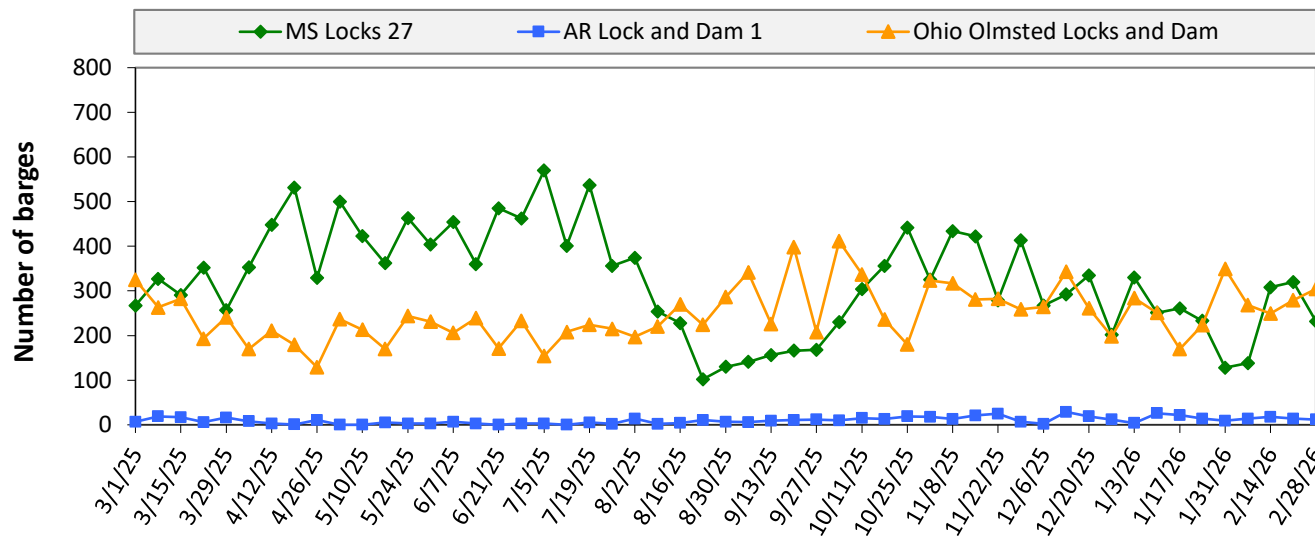
Table 10. Barged grain movements (1,000 tons)

For the week ending 02/28/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	0	0	0	0	0
Mississippi River (Winfield, MO (L25))	27	0	17	0	44
Mississippi River (Alton, IL (L26))	185	0	164	2	351
Mississippi River (Granite City, IL (L27))	171	0	150	2	323
Illinois River (La Grange)	152	0	121	2	274
Ohio River (Olmsted)	115	9	113	0	237
Arkansas River (L1)	0	9	11	0	20
Weekly total - 2026	285	18	274	2	579
Weekly total - 2025	234	27	162	0	422
2026 YTD	1,776	113	1,652	10	3,551
2025 YTD	2,573	147	2,238	20	4,978
2026 as % of 2025 YTD	69	77	74	49	71
Last 4 weeks as % of 2025	77	53	101	147	86
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.

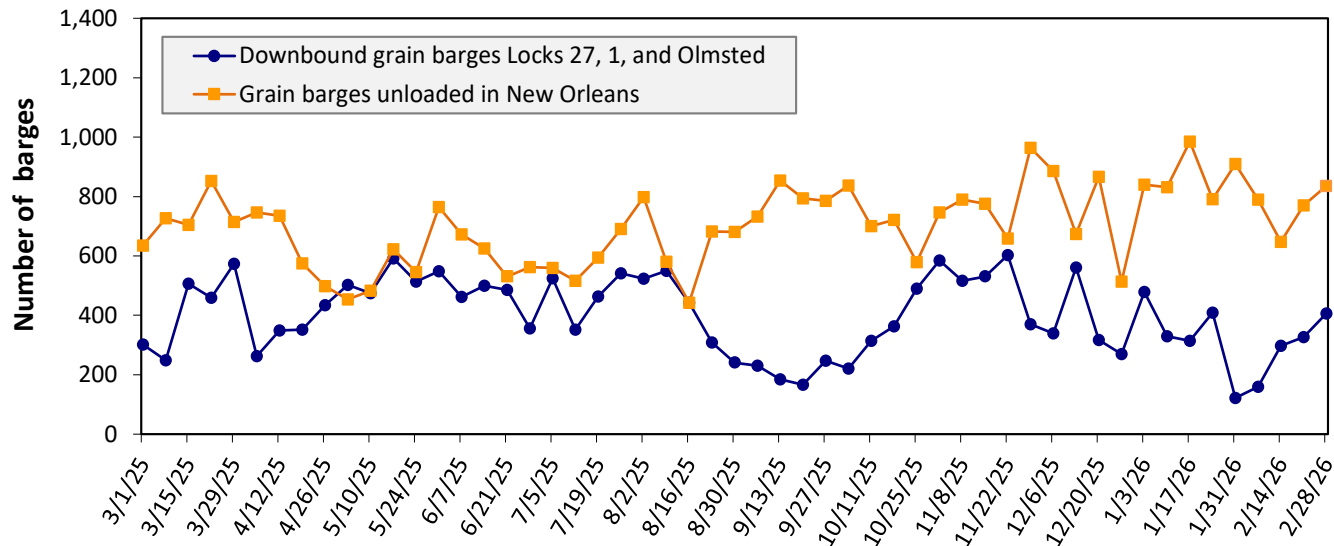
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending February 28: 548 barges transited the locks, 65 barges fewer than the previous week, and 11 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 February 28: 406 barges moved down river, 79 more than the previous week; 835 grain barges unloaded in the New Orleans Region, 8 percent more than the previous week.

Note: Olmsted = Olmsted Locks and Dam.

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

Table 11. Monthly barge freight rates Columbia-Snake River

River	Origin	\$/ton			Current month % change from the same month	
		March 2026	February 2026	March 2025	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$22.16	\$22.13	\$21.55	2.8	5.5
	Central Ferry, WA/Almota, WA	\$21.23	\$21.20	\$20.65	2.8	5.4
	Lyons Ferry, WA	\$20.18	\$20.15	\$19.64	2.8	5.2
	Windust, WA/Lower Monumental, WA	\$19.11	\$19.08	\$18.61	2.7	5.1
	Sheffler, WA	\$19.08	\$19.05	\$18.58	2.7	5.1
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$17.84	\$17.81	\$17.38	2.7	4.9
	Port Kelly, WA/Wallula, WA	\$17.61	\$17.58	\$17.16	2.6	4.8
	Umatilla, OR	\$17.51	\$17.48	\$17.06	2.7	4.8
	Boardman, OR/Hogue Warner, OR	\$17.24	\$17.21	\$16.80	2.6	4.8
	Arlington, OR/Roosevelt, WA	\$17.08	\$17.05	\$16.64	2.7	4.7
	Biggs, OR	\$15.70	\$15.67	\$15.31	2.6	4.4
	The Dalles, OR	\$14.56	\$14.53	\$14.21	2.5	4.1

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)

February, 2026	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	325	0	325
Columbia River (Bonneville Lock and Dam (L1))	438	0	438
Monthly total 2025	438	0	438
Monthly total 2024	355	0	355
2025 YTD	765	0	765
2024 YTD	756	0	756

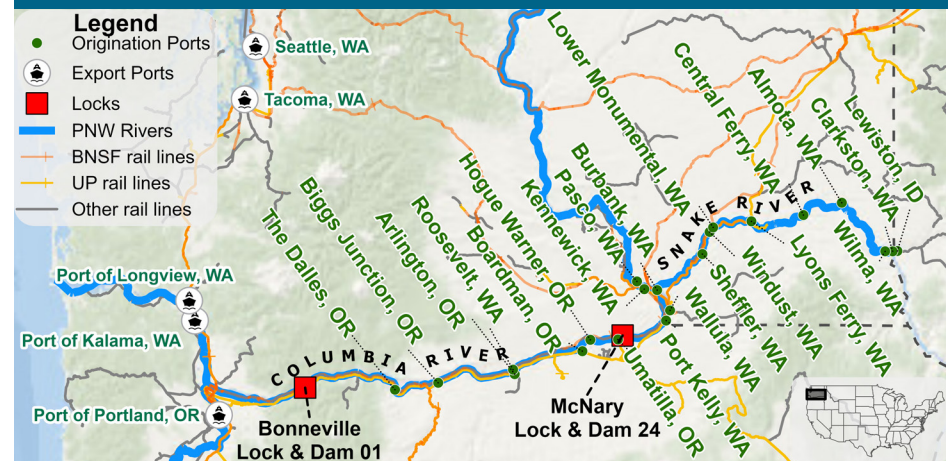
Note: "Other" refers to corn, soybeans, oats, barley, and rye. Totals may not add up because of rounding. "Monthly total" refers to grain moving through Lock 1, headed for export.

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.

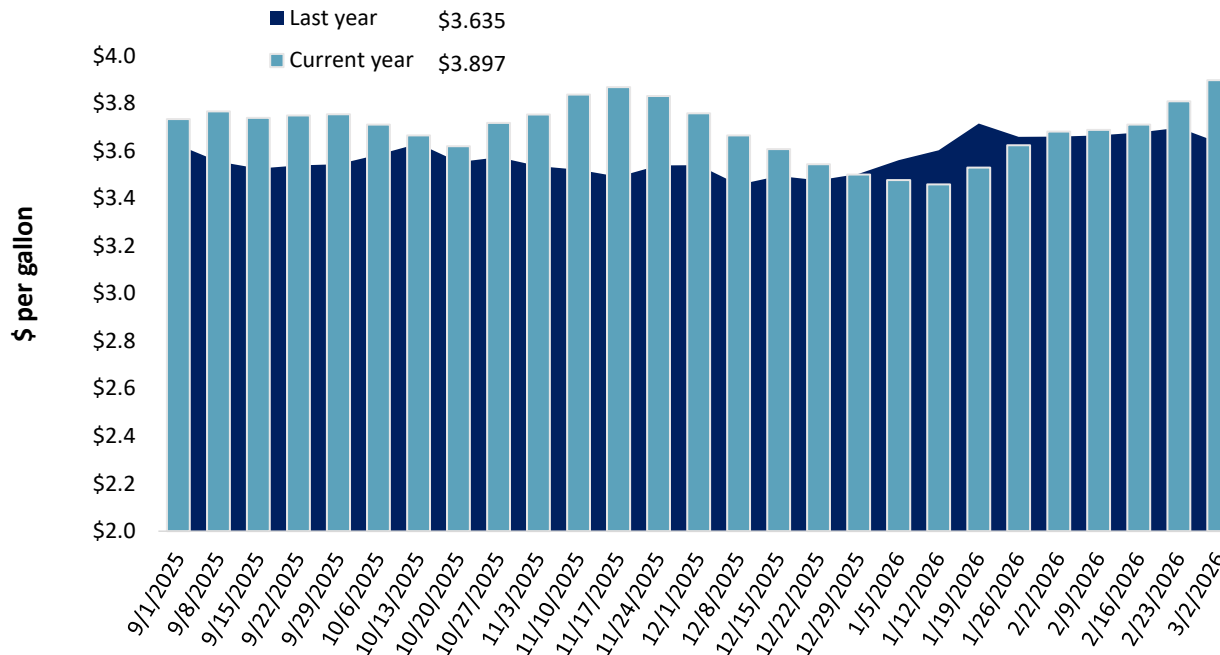
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 3/2/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.924	0.081	0.182
	New England	4.314	0.113	0.277
	Central Atlantic	4.122	0.018	0.196
	Lower Atlantic	3.808	0.100	0.165
II	Midwest	3.888	0.090	0.337
III	Gulf Coast	3.598	0.109	0.255
IV	Rocky Mountain	3.737	0.054	0.259
V	West Coast	4.534	0.069	0.231
	West Coast less California	4.138	0.088	0.309
	California	4.990	0.046	0.140
Total	United States	3.897	0.088	0.262

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 March 2, the U.S. average diesel fuel price increased 8.8 cents from the previous week to \$3.897 per gallon, 26.2 cents above the same week last year.

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

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

Grain Exports		Wheat						Corn	Soybeans	Total
		Hard red winter (HRW)	Soft red winter (SRW)	Hard red spring (HRS)	Soft white wheat (SWW)	Durum	All wheat			
Current unshipped (outstanding) export sales	For the week ending 2/26/2026	1,362	660	1,426	1,111	173	4,732	24,958	9,881	39,571
	This week year ago	1,406	798	1,522	1,314	77	5,116	21,739	6,699	33,554
	Last 4 wks. as % of same period 2024/25	105	87	91	97	231	98	117	161	123
Current shipped (cumulative) exports sales	2025/26 YTD	6,760	2,439	4,598	4,113	402	18,312	40,024	26,154	84,490
	2024/25YTD	3,524	2,266	4,988	4,121	249	15,149	27,818	37,488	80,454
	YTD 2025/26 as % of 2024/25	192	108	92	100	161	121	144	70	105
	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 2/26/2026	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	19,749	17,859	11	19,839
Japan	10,409	7,753	34	10,478
Colombia	5,227	5,006	4	5,493
China	0	32	-100	3,461
Korea	6,445	2,955	118	3,127
Top 5 importers	35,385	30,651	15	39,272
Total U.S. corn export sales	64,983	49,557	31	54,276
% of YTD current month's export projection	78%	68%	-	-
Change from prior week	2,023	909	-	-
Top 5 importers' share of U.S. corn export sales	54%	62%	-	72%
USDA forecast February 2026	83,824	72,597	15	-
Corn use for ethanol USDA forecast, February 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 2/26/2026	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	10,817	21,156	-49	26,078
Mexico	4,136	3,864	7	4,762
Japan	1,544	1,489	4	2,107
Egypt	4,052	2,449	65	2,098
Indonesia	1,489	1,126	32	1,997
Top 5 importers	22,039	30,084	-27	37,042
Total U.S. soybean export sales	36,034	44,187	-18	48,941
% of YTD current month's export projection	84%	86%	-	-
Change from prior week	383	293	-	-
Top 5 importers' share of U.S. soybean export sales	61%	68%	-	76%
USDA forecast, February 2026	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 2/26/2026	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	4,054	3,889	4	3,358
Philippines	2,729	2,512	9	2,473
Japan	1,990	1,914	4	2,045
China	264	139	90	1,137
Korea	1,845	2,178	-15	1,674
Taiwan	905	954	-5	935
Thailand	657	862	-24	667
Nigeria	1,412	531	166	629
Indonesia	1,070	641	67	518
Colombia	687	421	63	489
Top 10 importers	15,613	14,040	11	13,926
Total U.S. wheat export sales	23,044	20,265	14	19,135
% of YTD current month's export projection	94%	90%	-	-
Change from prior week	203	339	-	-
Top 10 importers' share of U.S. wheat export sales	68%	69%	-	73%
USDA forecast, February 2026	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)

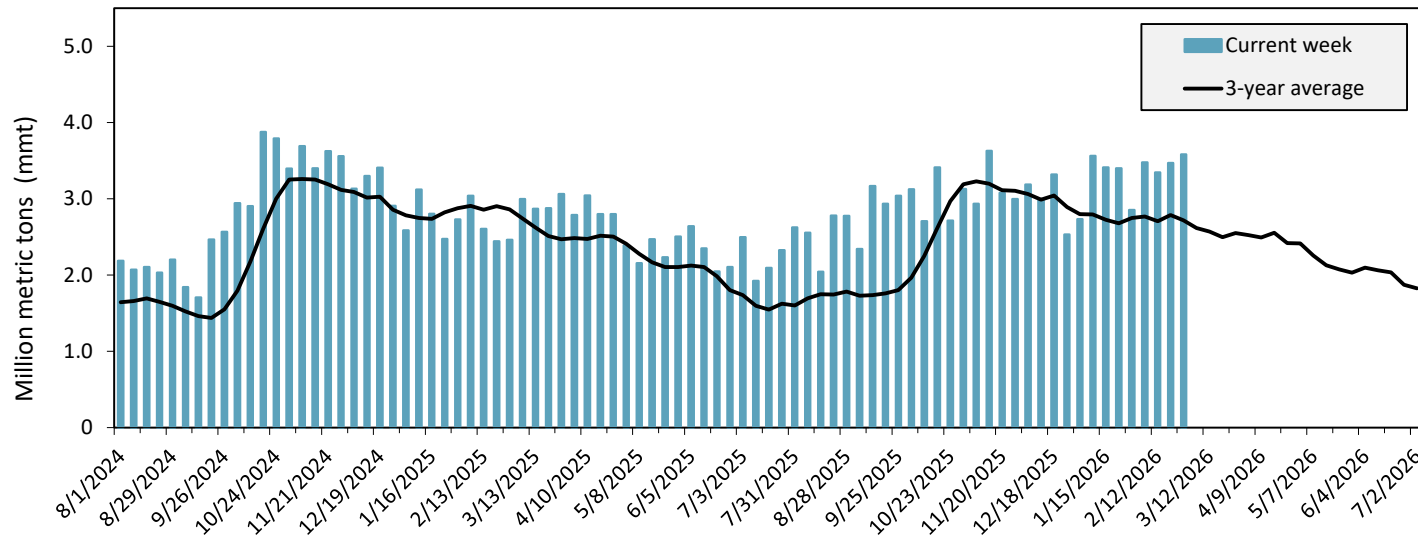
Port regions	Commodity	For the week ending 02/26/2026	Previous week*	Current week as % of previous	2026 YTD*	2025 YTD*	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	575	771	75	4,187	3,428	122	143	257	24,214
	Soybeans	139	67	207	1,827	1,187	154	202	82	2,957
	Wheat	200	274	73	1,731	1,628	106	123	106	12,271
	All grain	913	1,111	82	7,745	6,312	123	144	145	39,721
Mississippi Gulf	Corn	877	767	114	5,529	5,616	98	101	136	37,115
	Soybeans	783	456	172	6,260	5,115	122	124	92	23,350
	Wheat	48	101	47	469	457	103	115	86	3,980
	All grain	1,708	1,325	129	12,259	11,189	110	111	109	64,484
Texas Gulf	Corn	0	65	0	251	57	438	510	583	590
	Soybeans	0	0	n/a	87	86	101	0	0	1,431
	Wheat	65	120	55	715	361	198	155	187	4,690
	All grain	299	380	79	2,368	531	446	343	277	7,774
Interior	Corn	350	372	94	2,554	1,709	149	148	145	15,546
	Soybeans	106	154	69	1,091	1,049	104	105	87	7,712
	Wheat	31	68	46	396	429	92	79	84	3,104
	All grain	494	601	82	4,100	3,216	127	126	118	26,887
Great Lakes	Corn	0	0	n/a	0	0	n/a	n/a	n/a	414
	Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	63
	Wheat	0	0	n/a	11	22	50	0	0	434
	All grain	0	0	n/a	11	22	50	0	0	911
Atlantic	Corn	57	46	123	235	57	413	531	388	607
	Soybeans	8	5	155	216	393	55	35	31	1,085
	Wheat	0	0	n/a	0	0	n/a	n/a	0	81
	All grain	64	51	126	450	450	100	80	68	1,773
All Regions	Corn	1,859	2,020	92	12,756	10,867	117	126	171	78,486
	Soybeans	1,138	682	167	9,779	7,934	123	125	89	36,851
	Wheat	344	563	61	3,322	2,898	115	120	108	24,560
	All grain	3,581	3,468	103	27,231	21,825	125	132	128	141,803

*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.

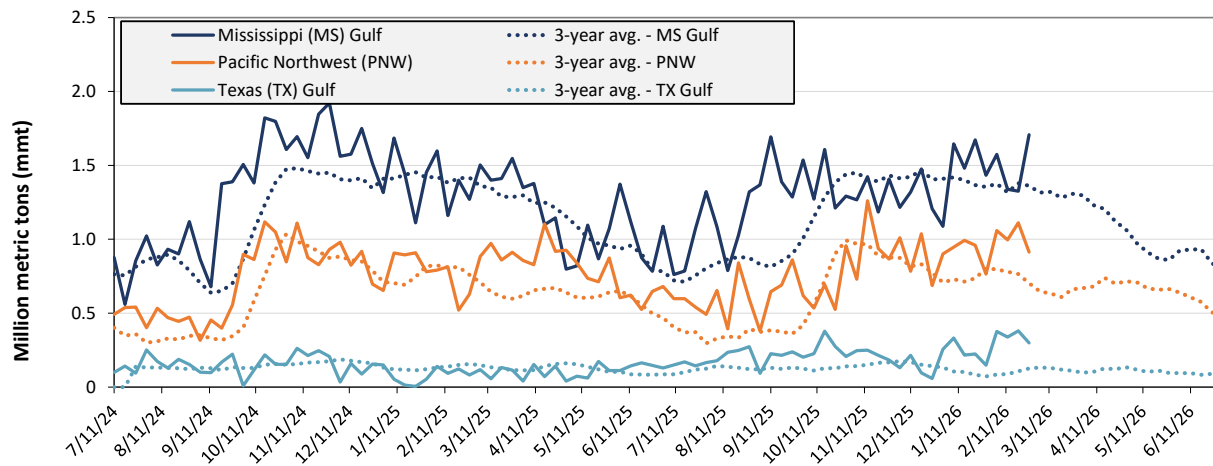
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending February 26: 3.6 mmt of grain inspected, up 3 percent from the previous week, up 49 percent from the same week last year, and up 32 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 02/26/26 inspections (mmt):

MS Gulf: 1.71

PNW: 0.91

TX Gulf: 0.3

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 29	down 21	up 18	down 18
Last year (same 7 days)	up 40	up 303	up 55	up 44
3-year average (4-week moving average)	up 25	up 138	up 35	up 30

Source: USDA, Federal Grain Inspection Service.

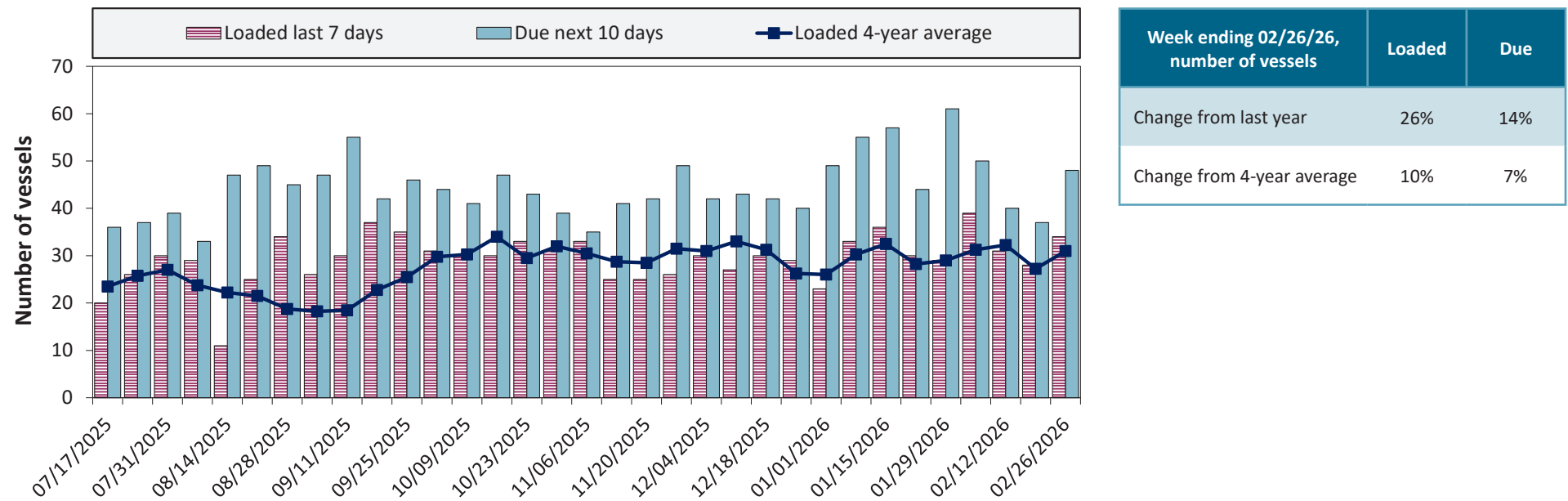
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
2/26/2026	36	34	48	15
2/19/2026	44	28	37	20
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.

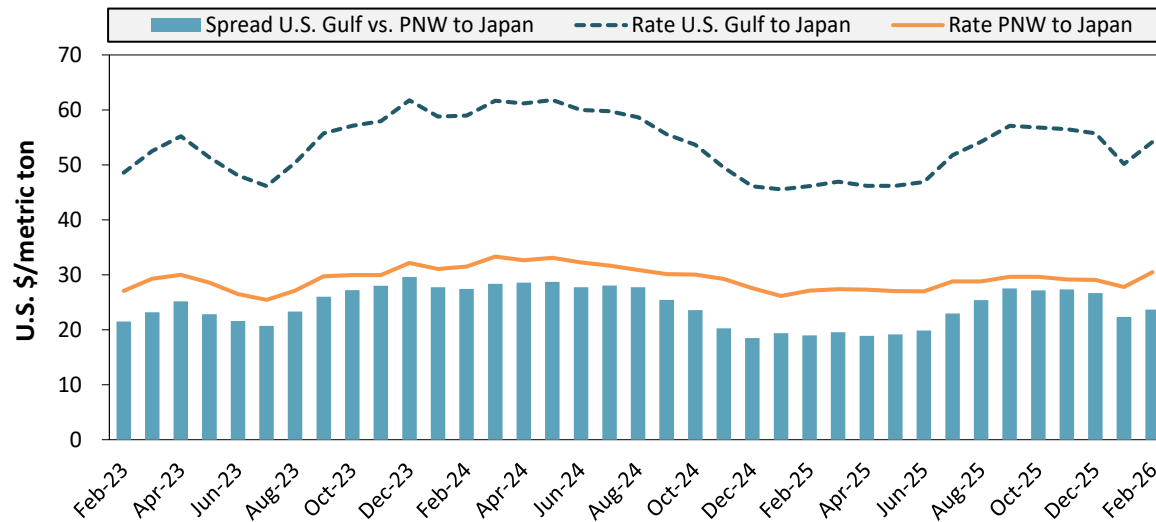
Figure 19. U.S. Gulf vessel loading activity



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
February 2026	\$54.19	\$30.50	\$23.69
Change from February 2025	18%	12%	25%
Change from 4-year average	-1%	0%	-2%

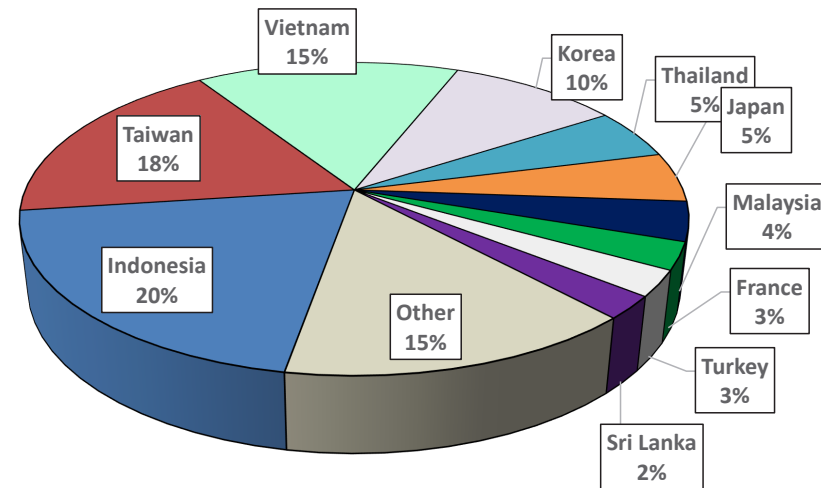
Table 20. Ocean freight rates for selected shipments, week ending 02/28/2026

Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Tanzania	Wheat	Feb 2, 2026	Feb 20/Mar 2, 2026	47,000	49.49
U.S. Gulf	Kenya	Wheat	Feb 3, 2026	Feb 5/15, 2026	47,000	49.95
U.S. Gulf	Nigeria	Wheat	Feb 27, 2026	Mar 5/15, 2026	43,260	52.44
PNW	S. China	Heavy grain	Feb 5, 2026	Feb 22/28, 2026	65,000	25.00
PNW	S. Korea	Heavy grain	Feb 5, 2026	Apr 15/May 25, 2026	60,000	29.40
Brazil	China	Heavy grain	Feb 25, 2026	Mar 2/11, 2026	66,000	47.00
Brazil	China	Heavy grain	Feb 23, 2026	Mar 18/25, 2026	64,000	41.00
Brazil	China	Heavy grain	Feb 11, 2026	Mar 14/30, 2026	66,000	40.00
Brazil	China	Heavy grain	Feb 11, 2026	Mar 9/30, 2026	66,000	40.75
Brazil	China	Soybeans	Feb 4, 2026	Feb 25/Mar 2, 2026	63,000	40.00
Brazil	China	Soybeans	Jan 26, 2026	Mar 1/10, 2026	66,000	38.00
Brazil	China	Heavy grain	Feb 4, 2026	Feb 28/Mar 2, 2026	63,000	39.75
Brazil	China	Heavy grain	Jan 16, 2026	Feb 2/6, 2026	66,000	34.50
Brazil	China	Heavy grain	Jan 8, 2026	Mar 1/31, 2026	66,000	35.00
Brazil	S. Korea	Heavy grain	Feb 4, 2026	Apr 1/30, 2026	58,000	47.50

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

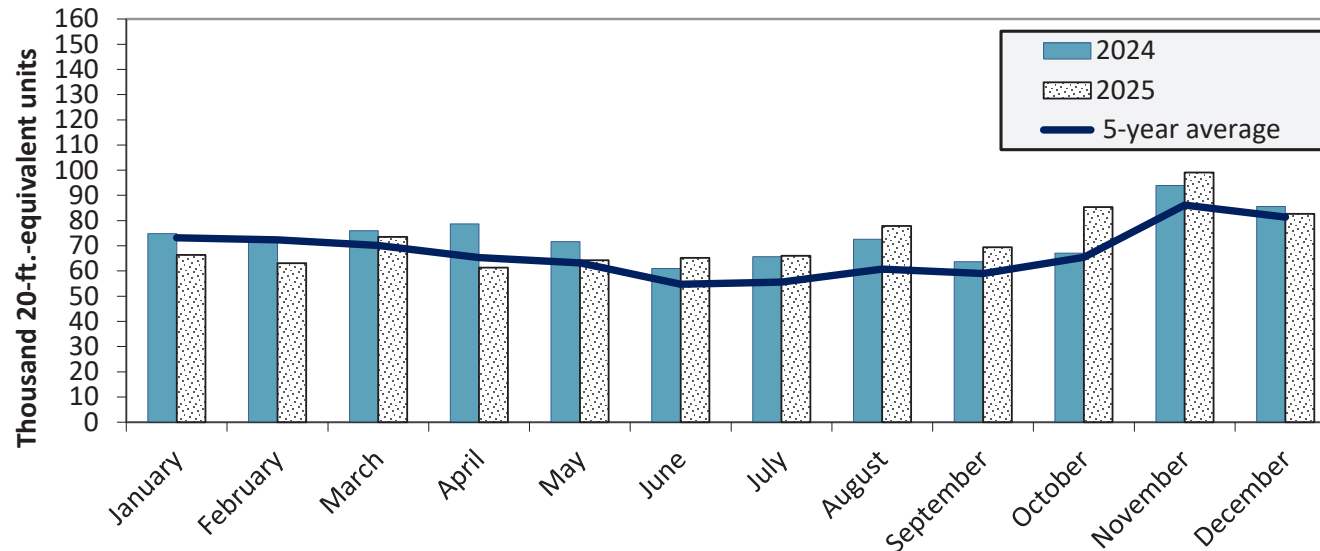
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Dec 2025



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 December 2025 were down 3.5 percent from last year but up 1.6 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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