



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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Nebraska Waives Hours-of-Service Regs for Hauling Hay, Feeds; Seeks Truckers To Haul Hay.

On March 16, in response to wildfires that have burned more than [800,000 acres](#) in Nebraska, the State's governor [waived hours-of-service restrictions](#) and raised maximum load width/weight limits for commercial motor carriers assisting affected areas and industries.

Effective for 14 days, the waiver is intended to expedite transport of feed, hay, and other critical supplies. Motor carriers operating under the waiver must obtain the required over-dimension or overweight permits from Nebraska's Department of Transportation, and the fees for these permits are also temporarily waived.

Additionally, Nebraska [seeks truckers to haul](#) hay for cattle rescued from the State's largest wildfire. A stipend to offset high fuel prices offers truckers 50 cents per mile for up to 500 miles per trip. To collect the stipend, participating truckers must register with Nebraska's Department of Agriculture and provide photo proof of the following: pickup and delivery of supplies (which may include a photo of a bill of lading or equivalent); pickup location and date; drop-off location and date; and round-trip mileage.

Mid- and Upper-Mississippi Reopen for Navigation.

On March 19, the National Grain and Feed Association [declared the Mid-Mississippi River open](#) for navigation after the MV John R. Operle (an empty dry cargo covered barge suitable for loading) reached Dubuque, IA, on March 18. Last year, the Mid-Mississippi River opened 9 days earlier ([Grain Transportation Report \(GTR\), March 13, 2025, second highlight](#)).

This week, on March 24, the U.S. Army Corps of Engineers [announced](#) that the first barge tow of the season had arrived at St. Paul, MN—the last Upper Mississippi River (UMR) port to open each year because of ice on Lake Pepin. In 2025, the navigation season on the UMR began on March 20 ([GTR, March 27, 2025, first highlight](#)).

In 2025, 12.8 million tons of [downbound grain](#) transited Lock and Dam 25 (the lowest lock before the Mississippi meets the Illinois River), up 39 percent from 2024.

Rising Diesel Prices Will Raise Rail Fuel Surcharges Beginning in May.

As a result of conflict in the Middle East ([GTR, March 19, 2026, first highlight](#)), the [U.S. average diesel fuel price](#) (as of March 23) has risen \$1.48 in 3 weeks to \$5.375 per gallon. Railroad fuel surcharges are based on the Energy Information Administration's on-highway diesel (OHD) fuel price. Because fuel surcharges are lagged by 2 months, March's diesel price increases will be reflected in May's fuel surcharges.

Assuming an average March OHD fuel price of \$5.10 per gallon, Union Pacific Railroad's fuel surcharge in May would rise to \$0.61 per mile (up from \$0.29 per mile in March), and BNSF Railway's fuel surcharge would rise to \$0.38 per mile (up from \$0.06 per mile in March). For an 1,800-mile route, these changes in fuel surcharges would add about \$575 per car to the total freight rate.

Anticipating a May rise in fuel surcharges, grain shippers are likely to maximize their shipping volumes in April to take advantage of April's lower fuel surcharges. In the secondary rail market, the average bids/offers for April 2026

shuttle train placements fell from \$600 per car in mid-December to \$87.50 per car in late-February. However, since the beginning of March, average bids/offers for April shuttle train placements has risen to \$387.50 per car ([GTR fig. 7](#)).

BNSF Expands Direct DET Offerings in Crop Year 2026/27.

BNSF Railway (BNSF) recently announced it will offer 30 Direct Destination Efficiency Trains ("Direct DETs") in crop year 2026/27 (which runs from August 2026 to July 2027)—up from 20 offerings last year and 15 offerings 2 years ago ([GTR, September 25, 2025, third highlight](#)).

As in previous years, 25 Direct DET offerings will require a 4-month commitment (with at least 3 loaded waybills). Starting this year, BNSF will offer five 1-year-long Direct DETs (with at least 12 loaded waybills). Like shuttle trains, Direct DETs are made up of 110 covered hopper railcars that move grain as a single unit. They differ from shuttles, however, in that they require fewer trip commitments, are not eligible for loading/unloading incentive payments, and cannot be unloaded in Pacific Northwest export terminals.

So far this year, shipper interest in Direct DETs has been minimal. Over the course of 5 auctions (since February 10) for 15 Direct DETs beginning in June and July, shippers have bid on only 3 Direct DETs (each for \$0).

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 March 19, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2025/26 totaled 36.37 million metric tons (mmt), down 3 percent from last week and up 20 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26 were 1.22 mmt, up 4 percent from last week. Net [soybean export sales](#) were 0.67 mmt, up 124 percent from last week. Net [wheat export sales](#) were 0.40 mmt, up 109 percent from last week.

Rail

U.S. Class I railroads originated 30,403 [grain carloads](#) during the week ending March 14. This was unchanged from the previous week, 18 percent more than last year, and 25 percent more than the 3-year average.

Average March [shuttle secondary railcar bids/offers](#) (per car) were \$500 above tariff for the week ending March 19. This was \$100 more than last week and \$94 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$50 above tariff. This was \$25 more than last week and \$450 lower than this week last year.

Barge

For the week ending March 21, [barged grain movements](#) totaled 621,300 tons. This was 30 percent more than the previous week and 7 percent less than the same week last year.

For the week ending March 21, 387 [barges moved down river](#), 76 more than the previous week. There were 749 grain barges unloaded in the New Orleans region, 6 percent fewer than the previous week.

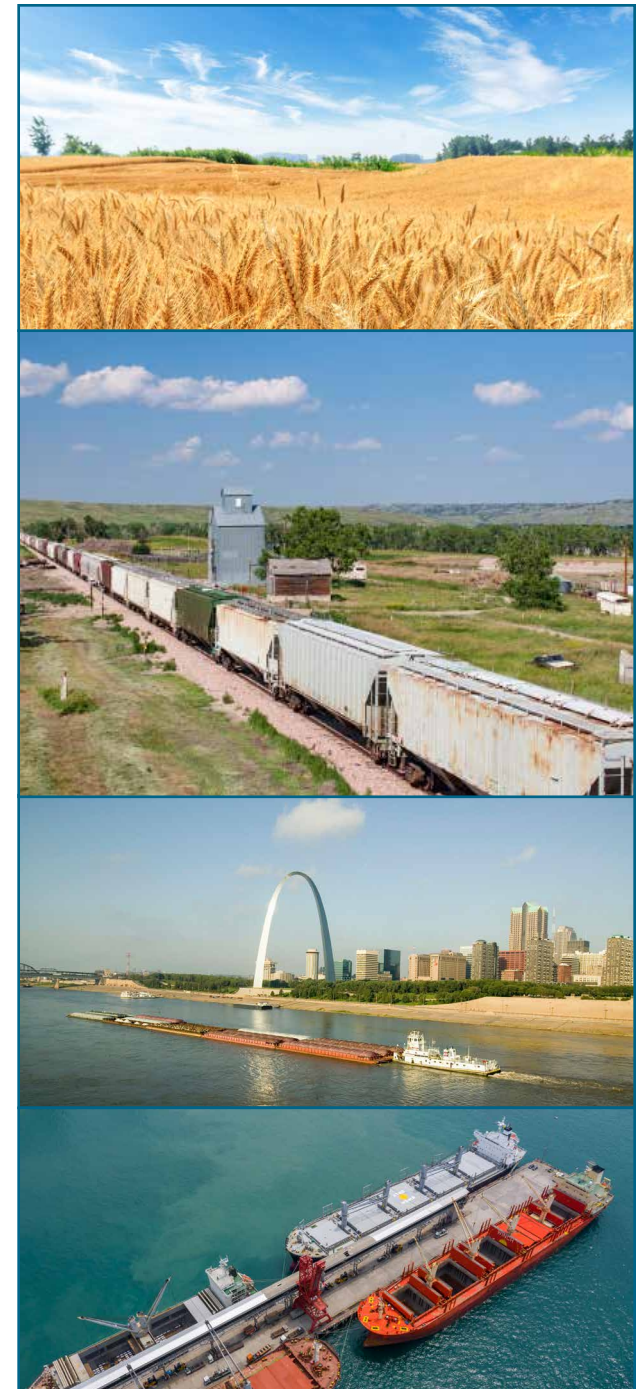
Ocean

For the week ending March 19, 40 [oceangoing grain vessels](#) were loaded in the Gulf—54 percent more than the same period last year. Within the next 10 days (starting March 20), 36 vessels were expected to be loaded—12 percent fewer than the same period last year.

As of March 19, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$62.25, up 3 percent from the previous week. The rate from the Pacific Northwest to Japan was \$34.25 per mt, up 1 percent from the previous week.

Fuel

For the week ending March 23, the [U.S. average diesel fuel price](#) increased 30.4 cents from the previous week to \$5.375 per gallon, 180.8 cents above the same week last year.



U.S. and Brazilian Soybean Transportation and Landed Costs in Fourth Quarter 2025

Both the United States and Brazil compete for the same overseas markets for soybean exports. The competitiveness of soybeans, for both countries, depends on low transportation and

landed costs (i.e., transportation costs plus farm values) to China and Europe—two key overseas export destinations. This article compares 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	
		4th qtr.	3rd qtr.	4th qtr.	Yr. to yr.	Qtr. to qtr.	4th qtr.	3rd qtr.	4th qtr.	Yr. to yr.	Qtr. to qtr.
		Minneapolis, MN --\$/mt--					Davenport, IA --\$/mt--				
United States via U.S. Gulf	Truck	17.87	17.35	16.31	-8.73	-5.99	17.87	17.35	16.31	-8.73	-5.99
	Barge	48.92	43.17	38.55	-21.20	-10.70	39.00	35.71	34.13	-12.49	-4.42
	Ocean	48.39	53.40	55.32	14.32	3.60	48.39	53.40	55.32	14.32	3.60
	Total transportation	115.18	113.92	110.18	-4.34	-3.28	105.26	106.46	105.76	0.48	-0.66
	Farm value	356.54	356.78	362.05	1.55	1.48	359.35	364.99	376.26	4.71	3.09
	Landed cost	471.72	470.70	472.23	0.11	0.33	464.61	471.45	482.02	3.75	2.24
	Transport % of landed cost	24.42	24.20	23.33	-1.09	-0.87	22.66	22.58	21.94	-0.71	-0.64
Route	Cost	2024	2025	2025	Percent change		2024	2025	2025	Percent change	
		4th qtr.	3rd qtr.	4th qtr.	Yr. to yr.	Qtr. to qtr.	4th qtr.	3rd qtr.	4th qtr.	Yr. to yr.	Qtr. to qtr.
		Fargo, ND --\$/mt--					Sioux Falls, SD --\$/mt--				
United States via PNW	Truck	17.87	17.35	16.31	-8.73	-5.99	17.87	17.35	16.31	-8.73	-5.99
	Rail	61.84	61.55	61.84	0.00	0.47	62.98	62.66	62.98	0.00	0.51
	Ocean	28.34	28.30	28.77	1.52	1.66	28.34	28.30	28.77	1.52	1.66
	Total transportation	108.05	107.20	106.92	-1.05	-0.26	109.19	108.31	108.06	-1.03	-0.23
	Farm value	347.47	338.90	352.49	1.44	4.01	350.78	353.84	356.29	1.57	0.69
	Landed cost	455.52	446.10	459.41	0.85	2.98	459.97	462.15	464.35	0.95	0.48
	Transport % of landed cost	23.72	24.03	23.27	-0.45	-0.76	23.74	23.44	23.27	-0.47	-0.16
Route	Cost	2024	2025	2025	Percent change		2024	2025	2025	Percent change	
		4th qtr.	3rd qtr.	4th qtr.	Yr. to yr.	Qtr. to qtr.	4th qtr.	3rd qtr.	4th qtr.	Yr. to yr.	Qtr. to qtr.
		North MT - Santos --\$/mt--					South GO - Paranagua --\$/mt--				
Brazil	Truck	70.75	92.10	92.65	30.95	0.60	41.56	55.59	55.68	33.97	0.16
	Ocean	34.40	39.00	38.90	13.08	-0.26	35.80	40.50	40.40	12.85	-0.25
	Total transportation	105.15	131.10	131.55	25.11	0.34	77.36	96.09	96.08	24.20	-0.01
	Farm Value	386.58	361.89	369.95	-4.30	2.23	363.97	361.35	372.87	2.45	3.19
	Landed Cost	491.73	492.99	501.50	1.99	1.73	441.33	457.44	468.95	6.26	2.52
	Transport % of landed cost	21.38	26.59	26.23	4.85	-0.36	17.53	21.01	20.49	2.96	-0.52

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. Source for U.S. Ocean freight rates: O'Neil Commodity Consulting. Source for 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 Paranaguá. 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. For exporting U.S. soybeans to China from Minneapolis, MN, and from Davenport, IA, via the U.S. Gulf, total transportation costs fell from third to fourth quarter 2025 (quarter to quarter) (table 1). Costs from Minneapolis and Davenport fell with lower truck and barge rates. Truck rates were down partly in response to lower diesel fuel prices. Although fourth-quarter barge utilization was generally high,

[low utilization](#) (and high barge availability) in October caused barge rates to fall quarter to quarter.

With lower truck rates, transportation costs also fell for shipping to China from Fargo, ND, and Sioux Falls, SD, via the Pacific Northwest (PNW) ([table 1](#)). The cost of shipping soybeans also decreased to Hamburg, Germany (Europe), through the U.S. Gulf from both Minneapolis and Davenport (table 2).

Brazil's transportation costs to China and Europe from North Mato Grosso (North MT) rose slightly in response to higher truck rates ([tables 1](#) and 2). Brazil's costs of shipping from South Goiás (South GO) to both destinations remained stable during the quarter.

Year-to-Year Transportation Costs. From fourth quarter 2024 to fourth quarter 2025 (year to year), transportation costs to China via the U.S. Gulf fell for shipping from Minneapolis,

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

Route	Cost	2024 4th qtr.	2025 3rd qtr.	2025 4th qtr.	Percent change		2024 4th qtr.	2025 3rd qtr.	2025 4th qtr.	Percent change			
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.		
		Minneapolis, MN						Davenport, IA					
		--\$/mt--						--\$/mt--					
United States via U.S. Gulf	Truck	17.87	17.35	16.31	-8.73	-5.99	17.87	17.35	16.31	-8.73	-5.99		
	Barge	48.92	43.17	38.55	-21.20	-10.70	39.00	35.71	34.13	-12.49	-4.42		
	Ocean	23.64	24.56	24.97	5.63	1.67	23.64	24.56	24.97	5.63	1.67		
	Total transportation	90.43	85.08	79.83	-11.72	-6.17	80.51	77.62	75.41	-6.33	-2.85		
	Farm value	356.54	356.78	362.05	1.55	1.48	359.35	364.99	376.26	4.71	3.09		
	Landed cost	446.97	441.86	441.88	-1.14	0.00	439.86	442.61	451.67	2.68	2.05		
	Transport % of landed cost	20.23	19.25	18.07	-2.17	-1.19	18.30	17.54	16.70	-1.61	-0.84		
Route	Cost	2024 4th qtr.	2025 3rd qtr.	2025 4th qtr.	Percent change		2024 4th qtr.	2025 3rd qtr.	2025 4th qtr.	Percent change			
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.		
		North MT - Santos						South GO - Paranagua					
		--\$/mt--						--\$/mt--					
Brazil	Truck	70.75	92.10	92.65	30.95	0.60	41.56	55.59	55.68	33.97	0.16		
	Ocean	32.20	36.50	36.45	13.20	-0.14	32.10	36.30	36.20	12.77	-0.28		
	Total transportation	102.95	128.60	129.10	25.40	0.39	73.66	91.89	91.88	24.74	-0.01		
	Farm Value	386.58	361.89	369.95	-4.30	2.23	363.97	361.35	372.87	2.45	3.19		
	Landed Cost	489.53	490.49	499.05	1.94	1.75	437.63	453.24	464.75	6.20	2.54		
	Transport % of landed cost	21.03	26.22	25.87	4.84	-0.35	16.83	20.27	19.77	2.94	-0.50		

Note: Source for U.S. Ocean freight rates: O'Neil Commodity Consulting. Source for U.S. farm values: USDA, National Agricultural Statistics Service. Landed cost 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.

but rose from Davenport, IA. Via the PNW, costs to China fell from Fargo, ND, and Sioux Falls, SD. Costs to Europe via the U.S. Gulf fell from both Minneapolis and Davenport. All U.S. Gulf routes saw truck and barge rates fall. Across all U.S. routes (Gulf and PNW), ocean freight rates increased.

Brazil's transportation costs rose year to year, for all routes, as higher truck and ocean freight rates pushed up Brazil's total transportation costs.

Quarter-to-Quarter Landed Costs. Quarter to quarter, landed costs rose in the United States—except for Gulf-route shipments to Europe from Minneapolis. Landed costs rose because of increasing farm values.

In Brazil, landed costs rose for shipments out of North MT with rising transportation costs and farm values. For shipments out of South GO to China and Europe, landed costs rose with farm value increases that outweighed declines in transportation costs.

The share of fourth-quarter U.S. landed costs comprising transportation was 22-23 percent for shipments to China ([table 1](#)) and 17-18 percent to Europe ([table 2](#)). The transportation share of Brazil's total landed costs was 20-26 percent to China and to Europe.

Year-to-Year Landed Costs. Year to year—except for the Gulf route from Minneapolis, MN, to Europe—U.S. landed costs rose, mainly because of higher soybean farm values.

In Brazil, landed costs rose for all routes, either because of higher transportation costs or a combination of higher transportation costs and higher farm values.

U.S. Exports to China. According to [USDA's Foreign Agricultural Service's Global Agricultural Trade System data](#), in fourth quarter 2025, the United States exported 1.44 million metric tons (mmt) of soybeans to China—down 14.22 mmt (–91 percent) from 2024. According to [Comex Stat \(Brazil's official merchandise trade system\) data](#), Brazil

exported 12.80 mmt of soybeans to China in fourth quarter 2025, up 5.74 mmt (+81 percent) from 2024.

In 2025, the United States exported 7.37 mmt of soybeans to China—down from 26.81 mmt in 2024. Conversely, Brazil exported 85.43 mmt of soybeans to China in 2025—up from 72.52 mmt in 2024.

According to USDA's March [World Agricultural Supply and Demand Estimates report](#), 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. Brazil is projected to export 114.00 mmt of soybeans 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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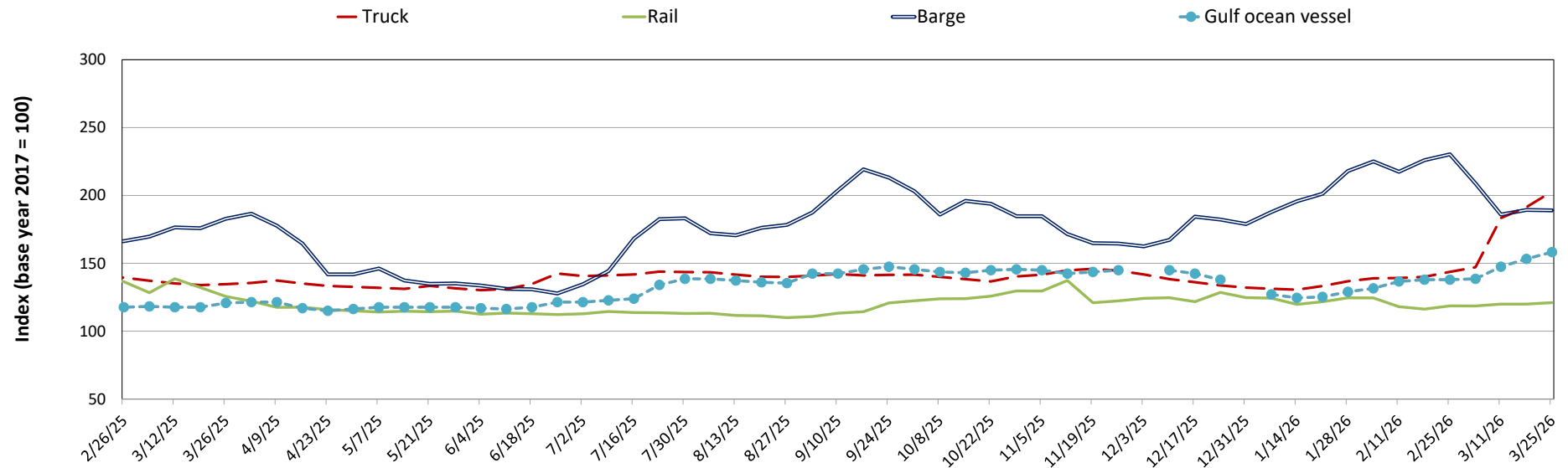
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
03/25/26	203	121	189	158	163
03/18/26	191	120	189	153	160
03/26/25	135	126	183	121	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.

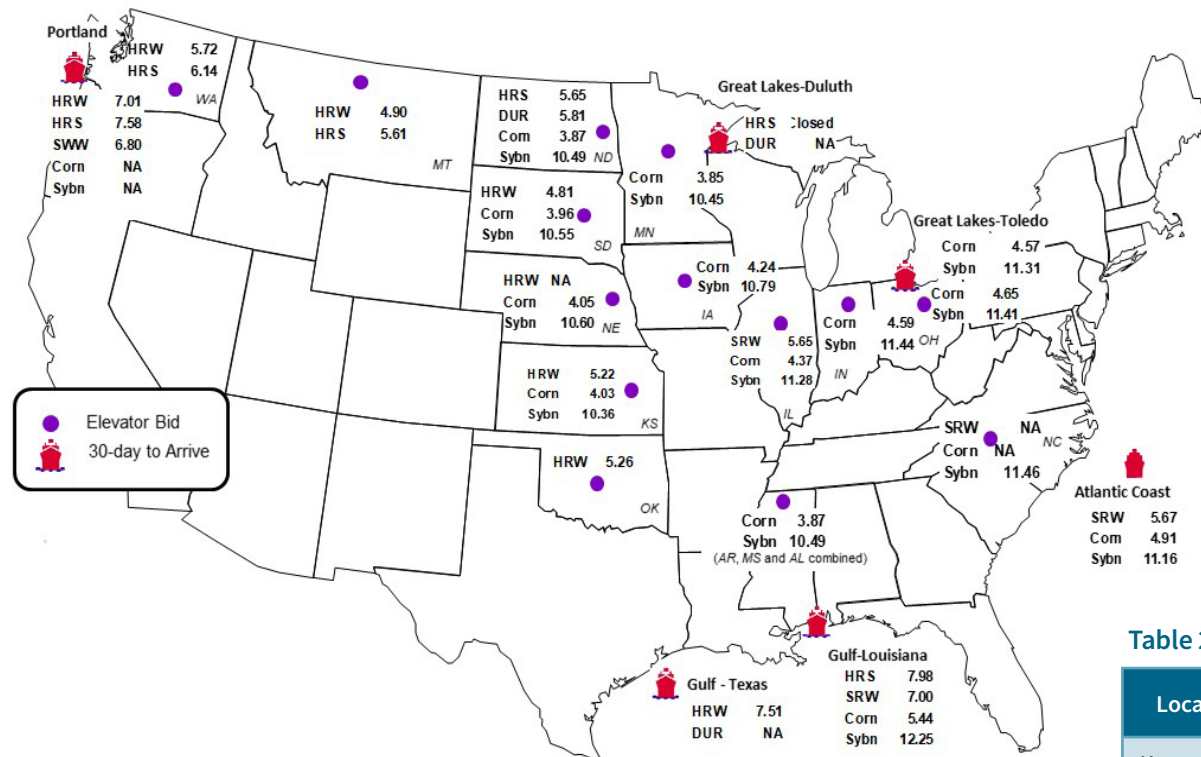
Figure 1. Grain transportation cost indicators as of week ending 3/25/26



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	3/20/2026	3/13/2026
Corn	IL-Gulf	-1.07	-1.06
Corn	NE-Gulf	-1.39	-1.39
Soybean	IA-Gulf	-1.46	-1.52
HRW	KS-Gulf	-2.29	-2.29
HRS	ND-Portland	-1.93	-2.22

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	3/20/2026	Week ago 3/13/2026	Year ago 3/21/2025
Kansas City	Wheat	May	6.060	6.300	5.780
Minneapolis	Wheat	May	6.280	6.455	6.050
Chicago	Wheat	May	5.950	6.136	5.476
Chicago	Corn	May	4.652	4.670	4.634
Chicago	Soybean	May	11.612	12.252	10.076

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.

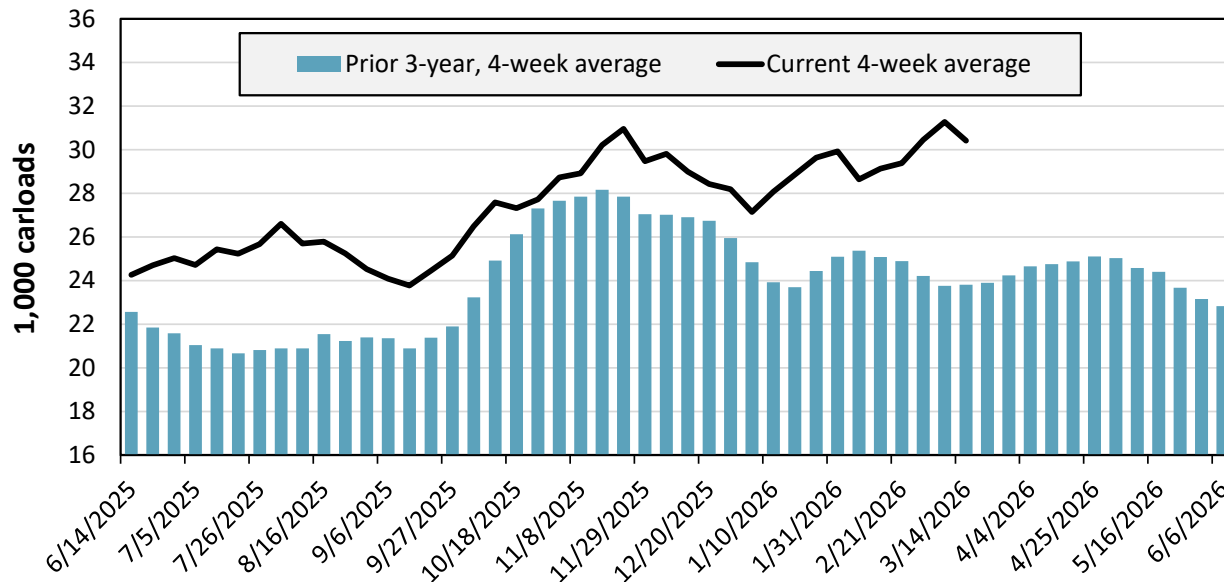
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 3/14/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,531	2,936	13,906	6,687	3,708	1,635	30,403
This week last year	1,524	2,644	11,260	5,752	3,310	1,188	25,678
2026 YTD	15,214	27,337	133,002	72,304	36,286	18,177	302,320
2025 YTD	19,159	31,572	114,318	60,348	26,485	14,486	266,368
2026 YTD as % of 2025 YTD	79	87	116	120	137	125	113
Last 4 weeks as % of 2025	94	105	134	126	137	144	127
Last 4 weeks as % of 3-yr. avg.	86	107	134	130	139	142	128
Total 2025	81,717	140,116	608,958	313,968	157,757	79,502	1,382,018

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

Source: Surface Transportation Board.

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



For the 4 weeks ending March 14, grain carloads were down 3 percent from the previous week, up 27 percent from last year, and up 28 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: 3/13/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	35.1	29.3	16.6	22.8	20.0	18.4	23.7
	Average over last 4 weeks	37.5	27.0	18.9	20.0	14.1	25.1	23.8
	Average of same 4 weeks last year	26.7	32.8	56.7	19.6	11.8	n/a	29.5
Average grain unit train speeds (miles per hour)	This week	22.2	17.0	24.0	23.2	22.9	20.0	21.5
	Average over last 4 weeks	22.7	19.2	24.6	23.4	22.9	19.3	22.0
	Average of same 4 weeks last year	21.8	18.8	24.2	21.5	22.4	n/a	21.7

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

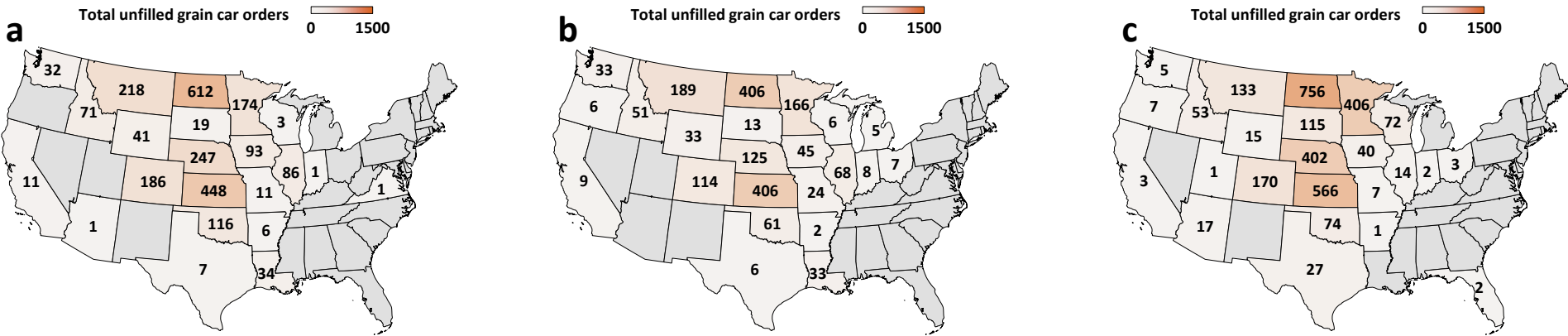
For the week ending: 3/13/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	25	9	327	68	3	162	595
	Average over last 4 weeks	43	7	324	65	5	213	656
	Average of same 4 weeks last year	81	6	776	89	15	n/a	967
Average number of loaded grain cars not moved in over 48 hours	This week	70	172	440	38	32	354	1,107
	Average over last 4 weeks	51	141	444	51	28	402	1,117
	Average of same 4 weeks last year	97	225	1,280	84	11	n/a	1,696
Average number of grain unit trains held	This week	0	0	4	5	1	4	14
	Average over last 4 weeks	0	0	3	4	1	5	13
	Average of same 4 weeks last year	1	0	36	11	1	n/a	48
Total unfilled manifest grain car orders	This week	1	1	920	1,226	0	270	2,418
	Average over last 4 weeks	17	20	708	873	0	222	1,839
	Average of same 4 weeks last year	8	1	997	1,285	0	n/a	2,291

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](#).

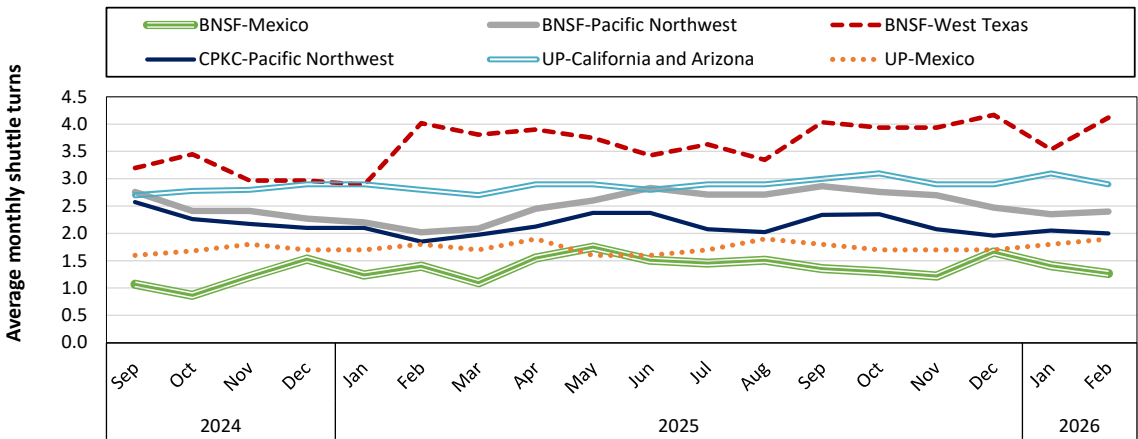
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 3/13/2026 (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

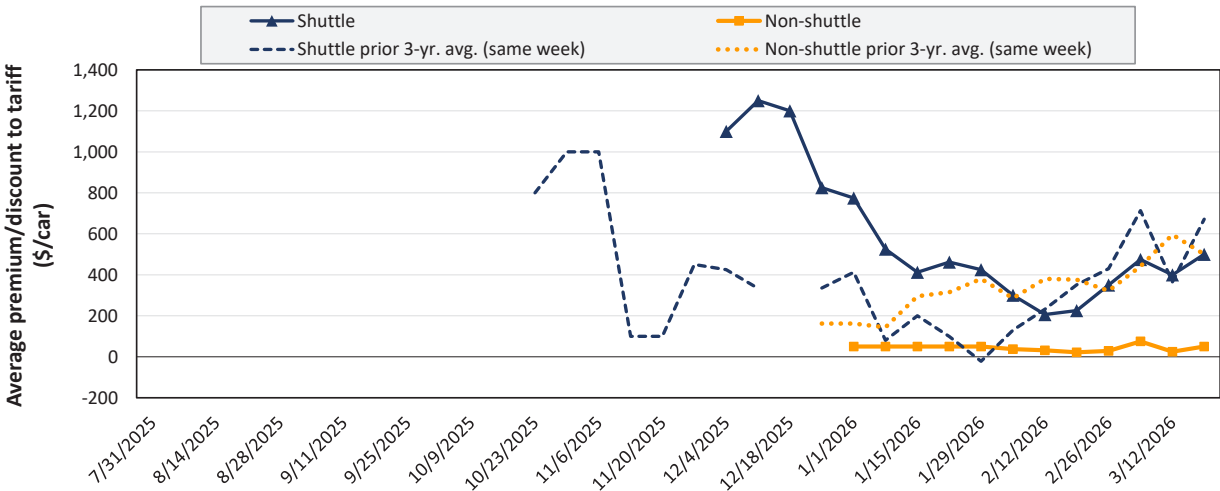


In February 2026, BNSF Railway’s average monthly grain shuttle turns were 1.3 to Mexico, 2.4 to the Pacific Northwest, and 4.1 to West Texas. CPKC’s shuttle turns averaged 2 to the Pacific Northwest. Union Pacific Railroad’s shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.9 to Mexico.

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

Railroads periodically auction guaranteed grain car service for an individual trip or a period of time (e.g., 1 year). This ordering system is referred to as the “primary market.” Once grain shippers acquire guaranteed freight on the primary market, they can trade that freight with other shippers through a broker. These transactions are referred to as the “secondary market.” Secondary rail values are indicators of rail service quality and demand/supply. The values published herein are market indicators only and do not represent guaranteed prices.

Figure 6. Secondary market bids/offers for railcars to be delivered in March 2026



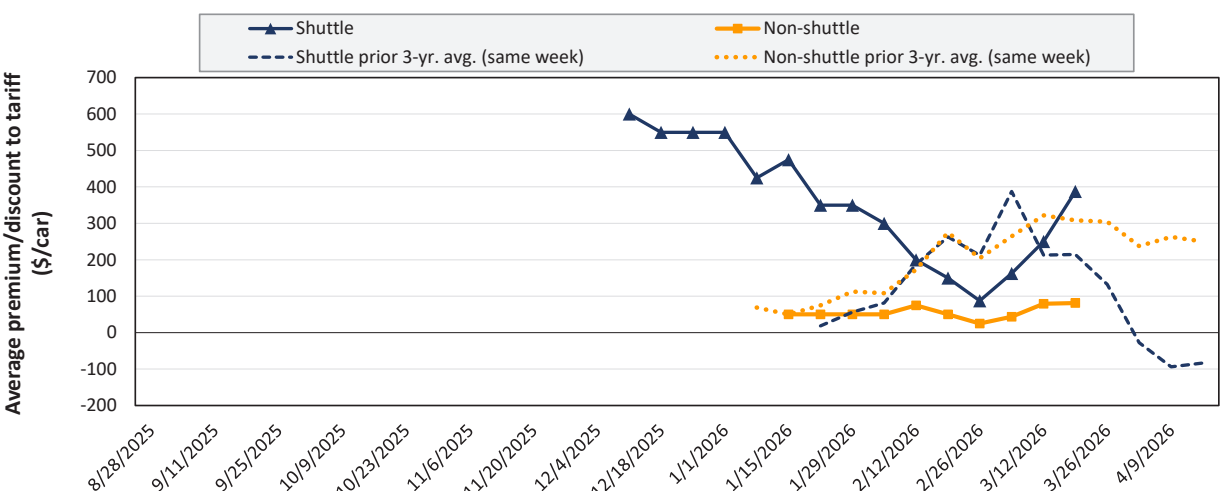
Average non-shuttle bids/offers rose \$25 this week, and are \$25 below the peak.

Average shuttle bids/offers rose \$100 this week and are \$750 below the peak.

3/19/2026	BNSF	UP
Non-Shuttle	\$50	n/a
Shuttle	\$500	\$500

Note: Shuttle bids/offers are for shuttle trains—110+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service.
n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service analysis of data from the Malsam Company.

Figure 7. Secondary market bids/offers for railcars to be delivered in April 2026



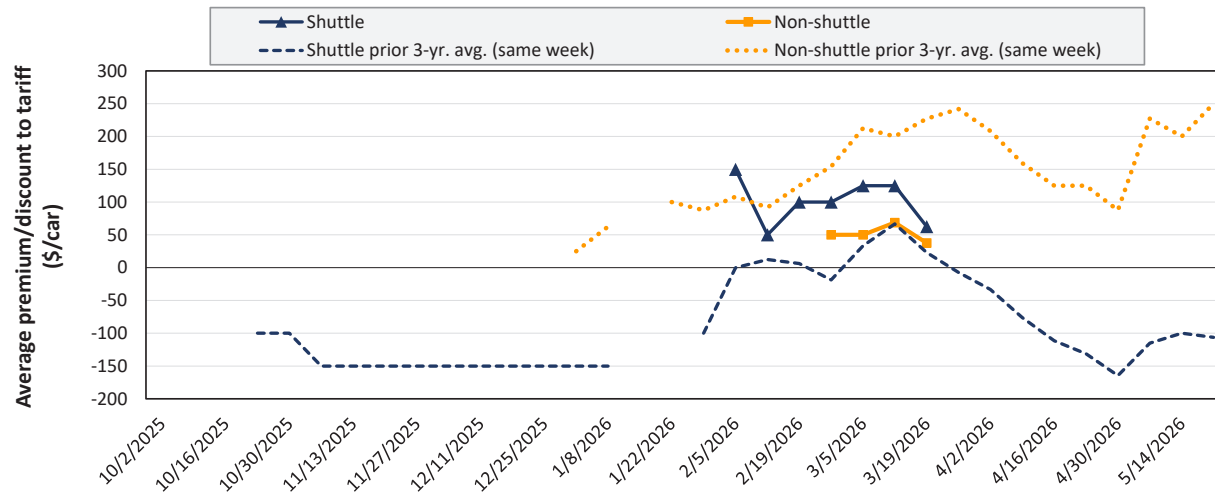
Average non-shuttle bids/offers rose \$2 this week, and are at the peak.

Average shuttle bids/offers rose \$138 this week and are \$213 below the peak.

3/19/2026	BNSF	UP
Non-Shuttle	\$25	\$138
Shuttle	\$525	\$250

Note: Shuttle bids/offers are for shuttle trains—110+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service analysis of data from the Malsam Company.

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



Average non-shuttle bids/offers fell \$31 this week, and are \$31 below the peak.

Average shuttle bids/offers fell \$63 this week and are \$88 below the peak.

3/19/2026	BNSF	UP
Non-Shuttle	\$25	\$50
Shuttle	\$125	\$0

Note: Shuttle bids/offers are for shuttle trains—110+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service analysis of data from the Malsam Company.

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

For the week ending: 3/19/2026		Delivery period					
		Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26
Non-shuttle	BNSF	50	25	25	n/a	n/a	n/a
	Change from last week	25	-8	-13	n/a	n/a	n/a
	Change from same week 2025	-450	-150	-100	n/a	n/a	n/a
	UP	n/a	138	50	n/a	n/a	n/a
	Change from last week	n/a	13	-50	n/a	n/a	n/a
	Change from same week 2025	n/a	0	-38	n/a	n/a	n/a
Shuttle	BNSF	500	525	125	100	n/a	n/a
	Change from last week	100	225	0	0	n/a	n/a
	Change from same week 2025	-325	144	-50	n/a	n/a	n/a
	UP	500	250	0	n/a	n/a	n/a
	Change from last week	100	50	n/a	n/a	n/a	n/a
	Change from same week 2025	138	263	0	n/a	n/a	n/a
	CPKC	100	0	100	n/a	n/a	n/a
	Change from last week	0	-50	0	n/a	n/a	n/a
	Change from same week 2025	-400	0	n/a	n/a	n/a	n/a

Note: Shuttle bids/offers are for shuttle trains—110+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service. Bids and offers represent a premium/discount to tariff rates; n/a = not available; BNSF = BNSF Railway; UP = Union Pacific Railroad; CPKC = Canadian Pacific Kansas City.
Source: USDA, Agricultural Marketing Service analysis of data from the Malsam Company.

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

Table 6. Rail tariff rates for wheat shipments, 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 Railway, CPKC, CSX Transportation, and Union Pacific Railroad.

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	\$41.65	\$1,383.65	\$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),	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	\$369.66	\$3,895.66	\$1.05	\$38.69	0.1
	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 Railway, Canadian National Railway, CPKC, CSX Transportation, and Union Pacific Railroad.

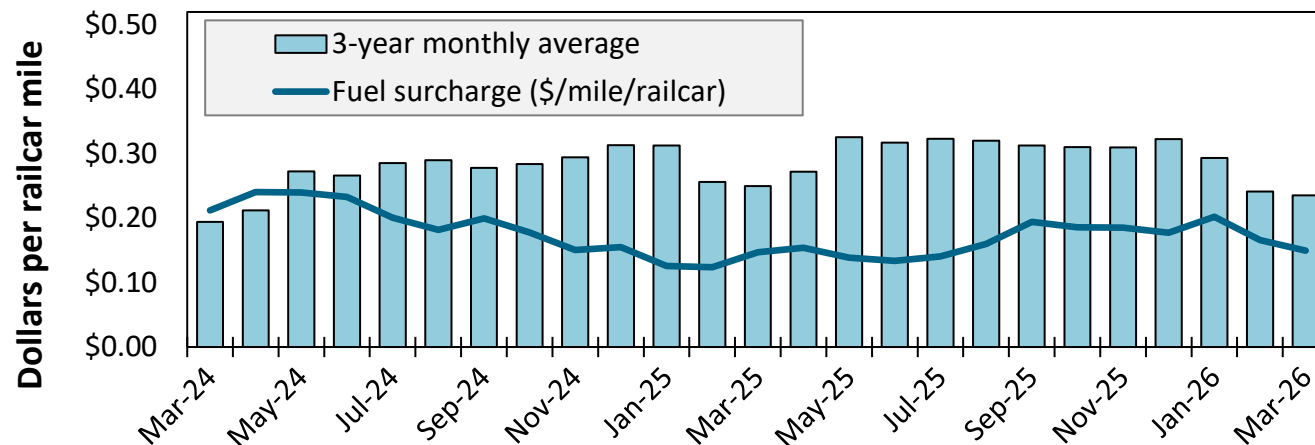
Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, March 2026

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 9. Railroad fuel surcharges, North American weighted average

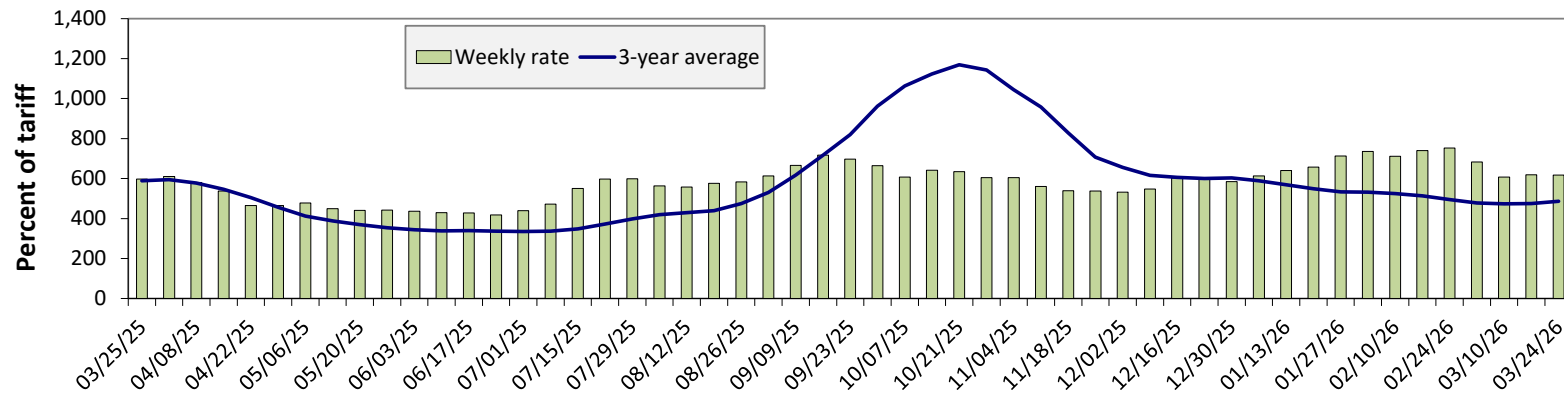


March 2026: \$0.15/mile, down 2 cents from last month's surcharge of \$0.17/mile; unchanged from the March 2025 surcharge of \$0.15/mile; and down 9 cents from the March prior 3-year average of \$0.24/mile.

Note: Weighted by each Class I railroad's proportion of grain traffic for the prior year.

Source: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Figure 10. Illinois River barge freight rate



For the week ending March 24: there is no change from the previous week; 3 percent higher than last year; and 27 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	3/24/2026	658	632	618	448	525	370
	3/17/2026	n/a	649	619	482	543	366
\$/ton	3/24/2026	40.73	33.62	28.68	17.88	24.62	11.62
	3/17/2026	n/a	34.53	28.72	19.23	25.47	11.49
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	9	7	3	-1	21	1
	3-year avg.	25	28	27	20	33	21
Rate	April	650	613	572	433	489	350
	June	596	549	498	414	450	339

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](#).

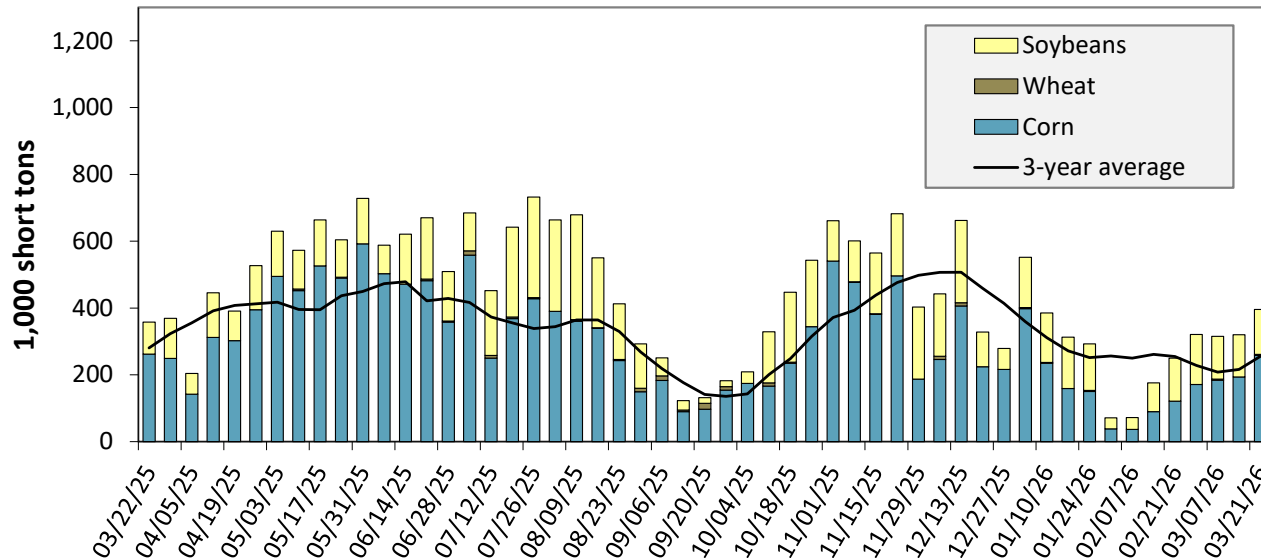
Source: USDA, Agricultural Marketing Service.

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 March 21: 11 percent higher than last year and 55 percent higher than the 3-year average.

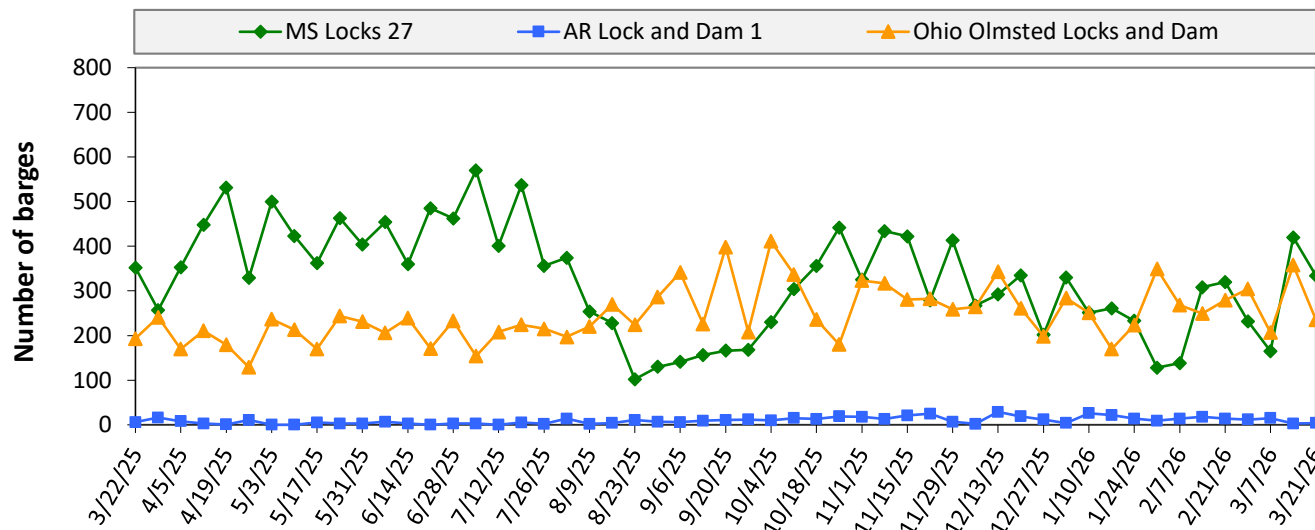
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 03/21/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	17	0	0	0	17
Mississippi River (Winfield, MO (L25))	60	3	16	0	79
Mississippi River (Alton, IL (L26))	248	3	135	0	386
Mississippi River (Granite City, IL (L27))	258	3	135	0	396
Illinois River (La Grange)	137	0	110	0	247
Ohio River (Olmsted)	98	7	82	2	189
Arkansas River (L1)	0	18	18	0	36
Weekly total - 2026	356	29	235	2	621
Weekly total - 2025	402	25	231	12	670
2026 YTD	2,722	181	2,331	28	5,261
2025 YTD	3,666	227	2,814	64	6,770
2026 as % of 2025 YTD	74	80	83	43	78
Last 4 weeks as % of 2025	93	81	129	43	103
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.

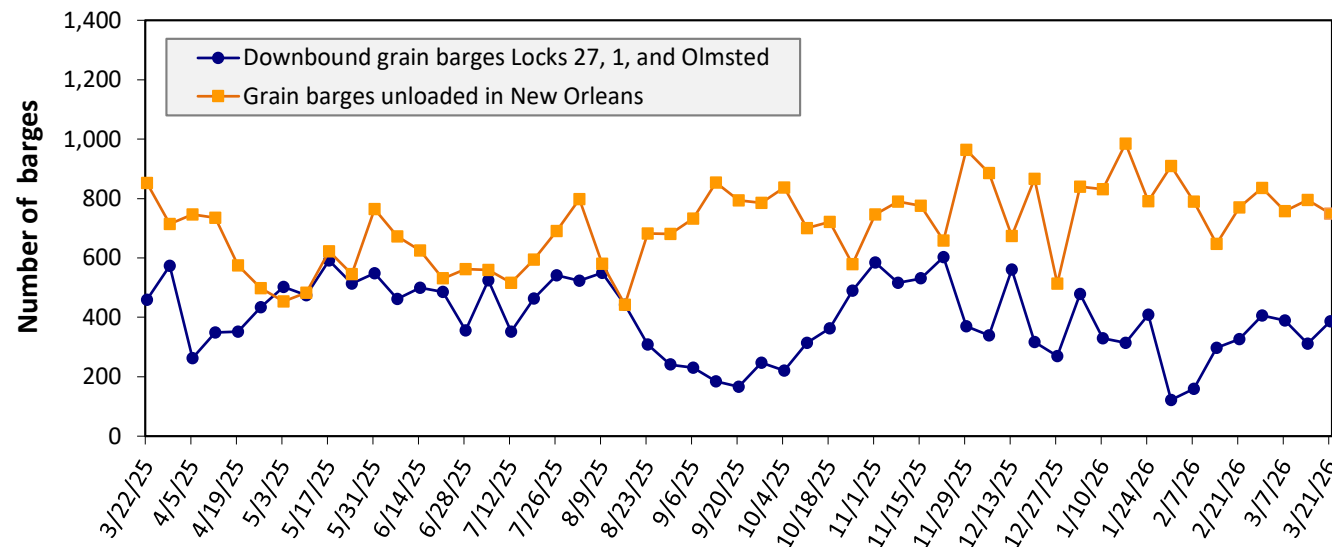
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending March 21: 573 barges transited the locks, 208 barges fewer than the previous week and 9 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 March 21: 387 barges moved down river, 76 more than the previous week; 749 grain barges unloaded in the New Orleans Region, 6 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	
		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.

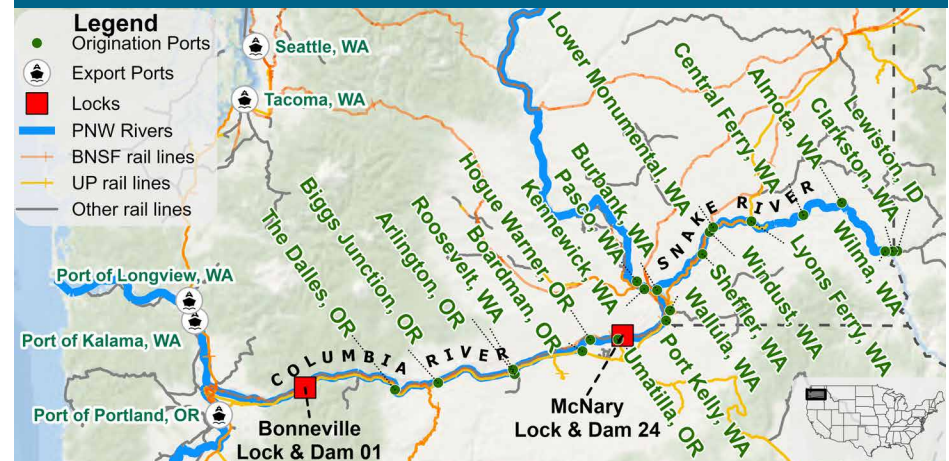
Table 12. Monthly barged grain movements, Columbia-Snake (1,000 tons)

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.

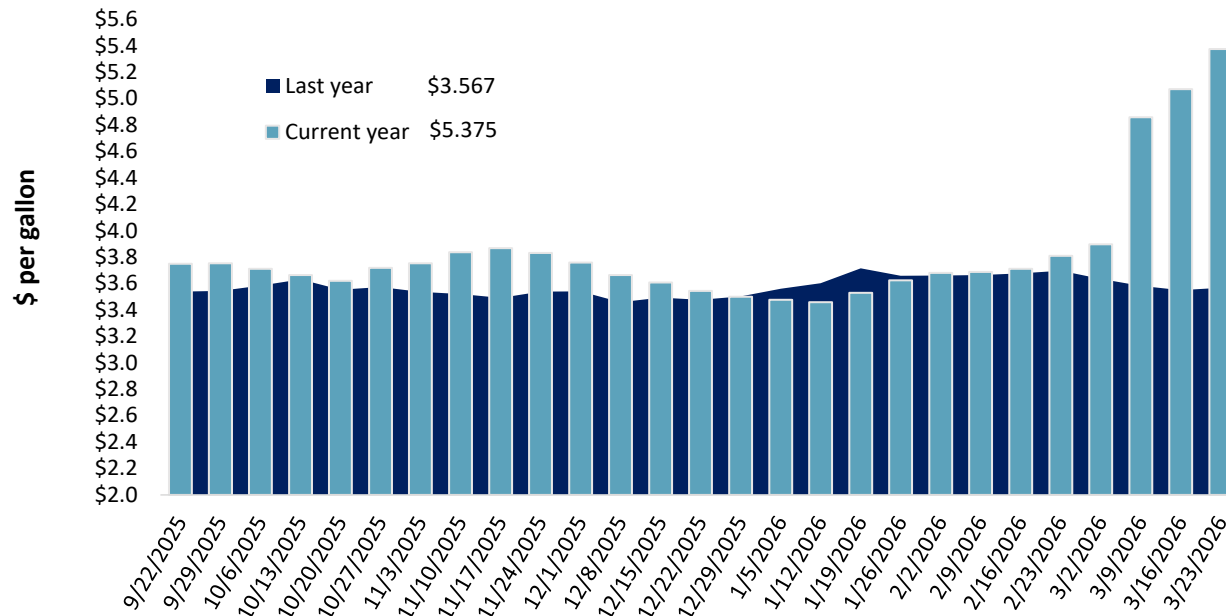
Table 13. Retail on-highway diesel prices, week ending 3/23/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	5.480	0.375	1.805
	New England	5.759	0.523	1.772
	Central Atlantic	5.629	0.433	1.757
	Lower Atlantic	5.395	0.338	1.826
II	Midwest	5.160	0.190	1.669
III	Gulf Coast	5.134	0.299	1.869
IV	Rocky Mountain	5.174	0.378	1.759
V	West Coast	6.310	0.454	2.081
	West Coast less California	5.826	0.466	2.072
	California	6.870	0.442	2.094
Total	United States	5.375	0.304	1.808

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 23, the U.S. average diesel fuel price increased 30.4 cents from the previous week to \$5.375 per gallon, 180.8 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 3/19/2026	1,404	646	1,356	1,042	129	4,576	23,738	8,058	36,373
	This week year ago	1,355	655	1,321	1,232	64	4,628	20,041	5,704	30,373
	Last 4 wks. as % of same period 2024/25	102	105	104	86	245	101	122	158	125
Current shipped (cumulative) exports sales	2025/26 YTD	7,097	2,658	4,982	4,319	455	19,511	45,137	29,198	93,846
	2024/25YTD	3,788	2,464	5,311	4,437	272	16,272	33,019	39,867	89,159
	YTD 2025/26 as % of 2024/25	187	108	94	97	167	120	137	73	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 3/19/2026	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	20,833	18,905	10	19,839
Japan	11,306	8,850	28	10,478
Colombia	5,669	5,385	5	5,493
China	0	33	-100	3,461
Korea	6,731	3,499	92	3,127
Top 5 importers	37,807	33,172	14	39,272
Total U.S. corn export sales	68,875	53,061	30	54,276
% of YTD current month's export projection	82%	73%	-	-
Change from prior week	1,218	1,040	-	-
Top 5 importers' share of U.S. corn export sales	55%	63%	-	72%
USDA forecast March 2026	83,824	72,597	15	-
Corn use for ethanol USDA forecast, March 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 3/19/2026	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	11,243	21,837	-49	26,078
Mexico	4,504	4,128	9	4,762
Japan	1,681	1,611	4	2,107
Egypt	4,172	2,541	64	2,098
Indonesia	1,739	1,311	33	1,997
Top 5 importers	23,340	31,427	-26	37,042
Total U.S. soybean export sales	37,257	45,571	-18	48,941
% of YTD current month's export projection	87%	89%	-	-
Change from prior week	669	338	-	-
Top 5 importers' share of U.S. soybean export sales	63%	69%	-	76%
USDA forecast, March 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 3/19/2026	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	4,509	3,924	15	3,358
Philippines	2,906	2,608	11	2,473
Japan	2,093	2,047	2	2,045
China	336	139	142	1,137
Korea	1,871	2,370	-21	1,674
Taiwan	975	959	2	935
Thailand	657	863	-24	667
Nigeria	1,412	636	122	629
Indonesia	1,071	754	42	518
Colombia	702	419	68	489
Top 10 importers	16,533	14,718	12	13,926
Total U.S. wheat export sales	24,087	20,900	15	19,135
% of YTD current month's export projection	98%	93%	-	-
Change from prior week	397	100	-	-
Top 10 importers' share of U.S. wheat export sales	69%	70%	-	73%
USDA forecast, March 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)

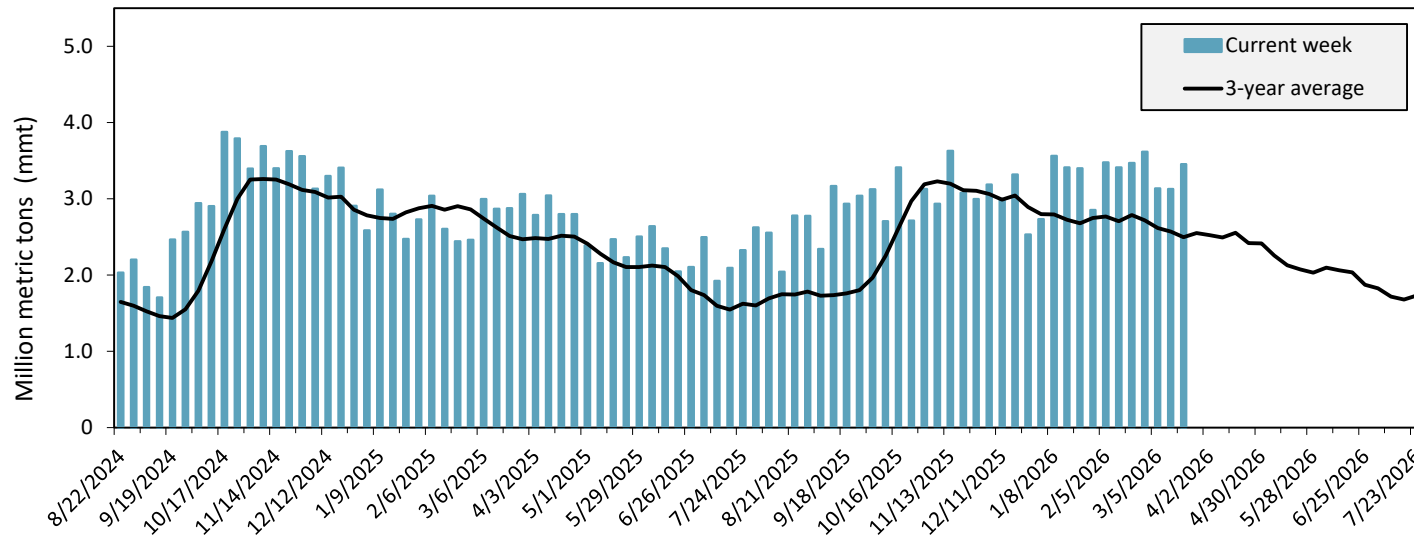
Port regions	Commodity	For the week ending 03/19/2026	Previous week*	Current week as % of previous	2026 YTD*	2025 YTD*	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	457	396	115	5,555	5,115	109	93	140	24,214
	Soybeans	268	272	99	2,571	1,451	177	268	329	2,957
	Wheat	124	110	112	2,272	2,201	103	91	100	12,271
	All grain	849	778	109	10,398	8,837	118	111	144	39,721
Mississippi Gulf	Corn	901	894	101	8,070	8,147	99	108	127	37,115
	Soybeans	641	534	120	7,904	6,840	116	106	113	23,350
	Wheat	159	38	414	697	606	115	156	87	3,980
	All grain	1,701	1,466	116	16,671	15,593	107	109	119	64,484
Texas Gulf	Corn	0	35	0	316	95	334	123	174	590
	Soybeans	0	0	n/a	87	106	82	0	0	1,431
	Wheat	100	126	79	1,006	565	178	138	168	4,690
	All grain	279	285	98	3,236	850	381	297	248	7,774
Interior	Corn	258	294	88	3,400	2,472	138	122	128	15,546
	Soybeans	128	172	74	1,579	1,456	108	107	103	7,712
	Wheat	76	69	111	647	608	106	111	121	3,104
	All grain	476	544	88	5,723	4,589	125	116	120	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	n/a	0	434
	All grain	0	0	n/a	11	22	50	n/a	0	911
Atlantic	Corn	84	52	161	378	89	426	456	618	607
	Soybeans	5	3	172	233	409	57	120	19	1,085
	Wheat	0	0	n/a	0	0	n/a	n/a	0	81
	All grain	89	55	161	611	498	123	349	139	1,773
All Regions	Corn	1,700	1,671	102	17,718	15,917	111	108	134	78,486
	Soybeans	1,102	981	112	12,778	10,367	123	129	132	36,851
	Wheat	458	344	133	4,634	4,002	116	110	109	24,560
	All grain	3,454	3,128	110	37,054	30,493	122	121	133	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, U.S. grain exports include 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.

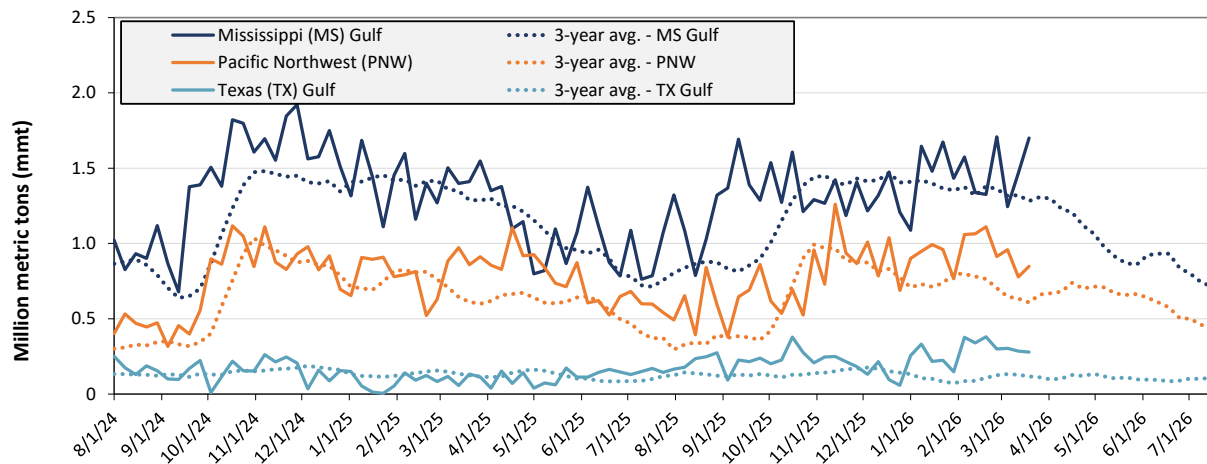
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending March 19: 3.5 mmt of grain inspected, up 10 percent from the previous week, up 22 percent from the same week last year, and up 38 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 03/19/26 inspections (mmt):

MS Gulf: 1.7

PNW: 0.85

TX Gulf: 0.28

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 16	down 2	up 13	up 9
Last year (same 7 days)	up 21	up 117	up 29	up 12
3-year average (4-week moving average)	up 33	up 137	up 41	up 39

Source: USDA, Federal Grain Inspection Service.

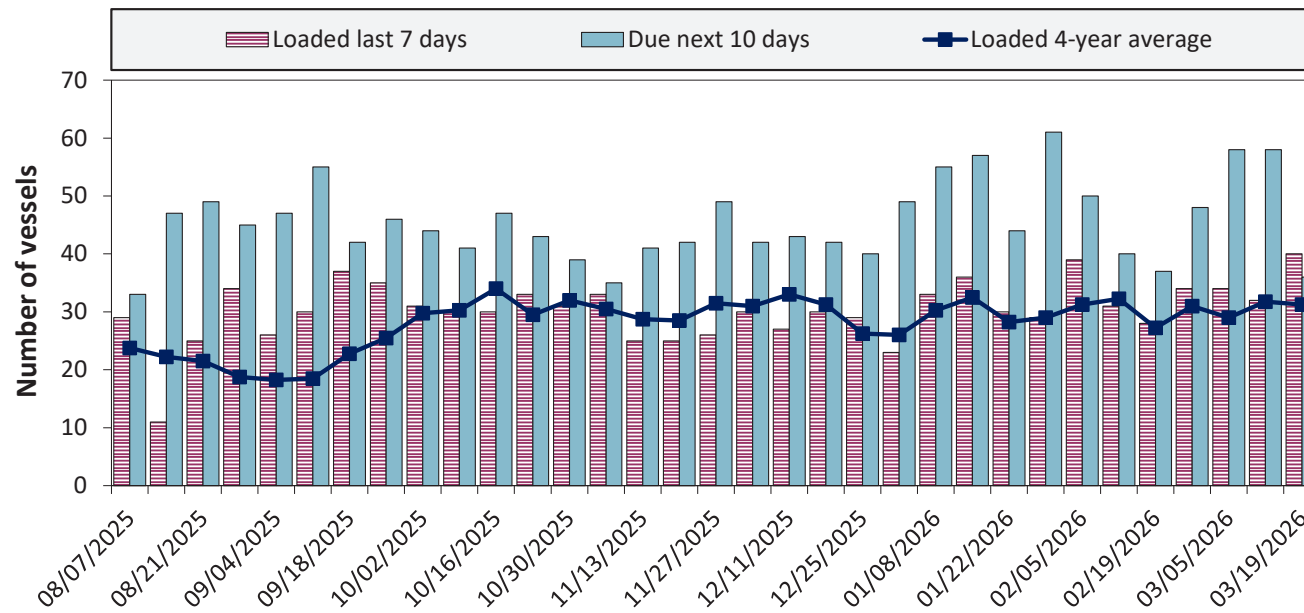
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
3/19/2026	36	40	36	17
3/12/2026	33	32	58	19
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

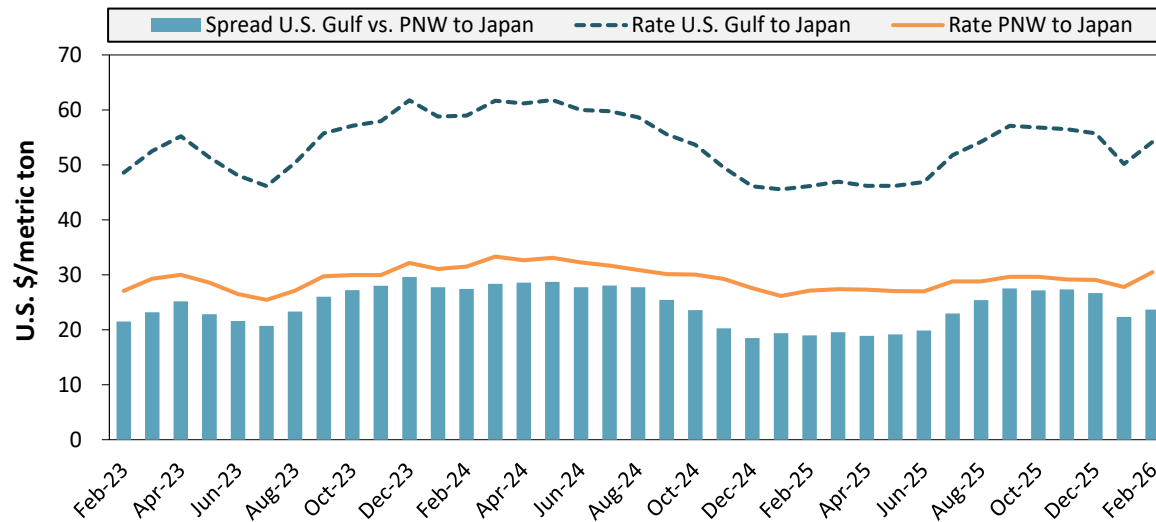


Week ending 03/19/26, number of vessels	Loaded	Due
Change from last year	54%	-12%
Change from 4-year average	28%	-19%

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%

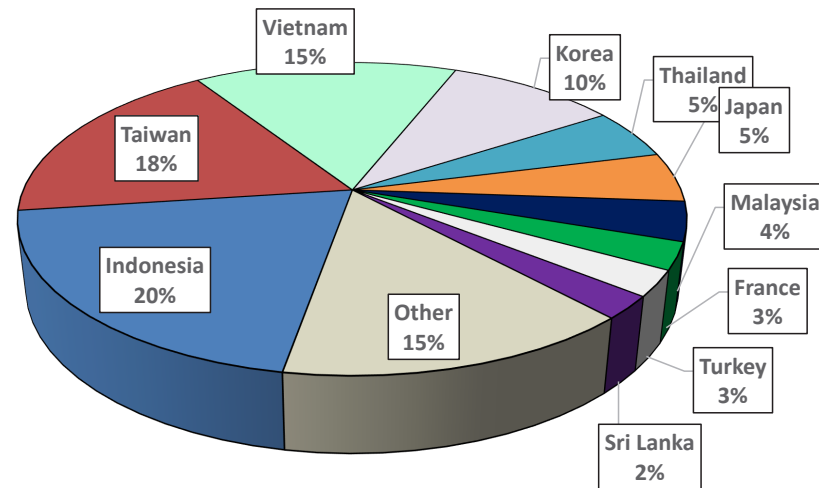
Table 20. Ocean freight rates for selected shipments, week ending 03/21/2026

Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Nigeria	Wheat	Feb 27, 2026	Mar 5/15, 2026	43,260	52.44
PNW	Bangladesh	Soybeans	Mar 11, 2026	May 1/10, 2026	48,400	57.31
PNW	S. Korea	Heavy grain	Mar 12, 2026	May 20/30, 2026	65,000	40.50
PNW	S. Korea	Heavy grain	Feb 5, 2026	Apr 15/May 25, 2026	60,000	29.40
PNW	S. Korea	Heavy grain	Mar 10, 2026	May 20/Jul 20, 2026	68,000	34.75
Brazil	N. China	Heavy grain	Mar 18, 2026	Apr 1/10, 2026	63,000	51.50
Brazil	China	Heavy grain	Mar 18, 2026	Apr 20/30, 2026	63,000	57.00
Brazil	China	Heavy grain	Mar 17, 2026	Mar 25/31, 2026	63,000	52.50
Brazil	China	Heavy grain	Mar 13, 2026	Apr 1/10, 2026	63,000	53.00
Brazil	China	Heavy grain	Mar 13, 2026	Mar 30/Apr 10, 2026	63,000	52.25
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	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.

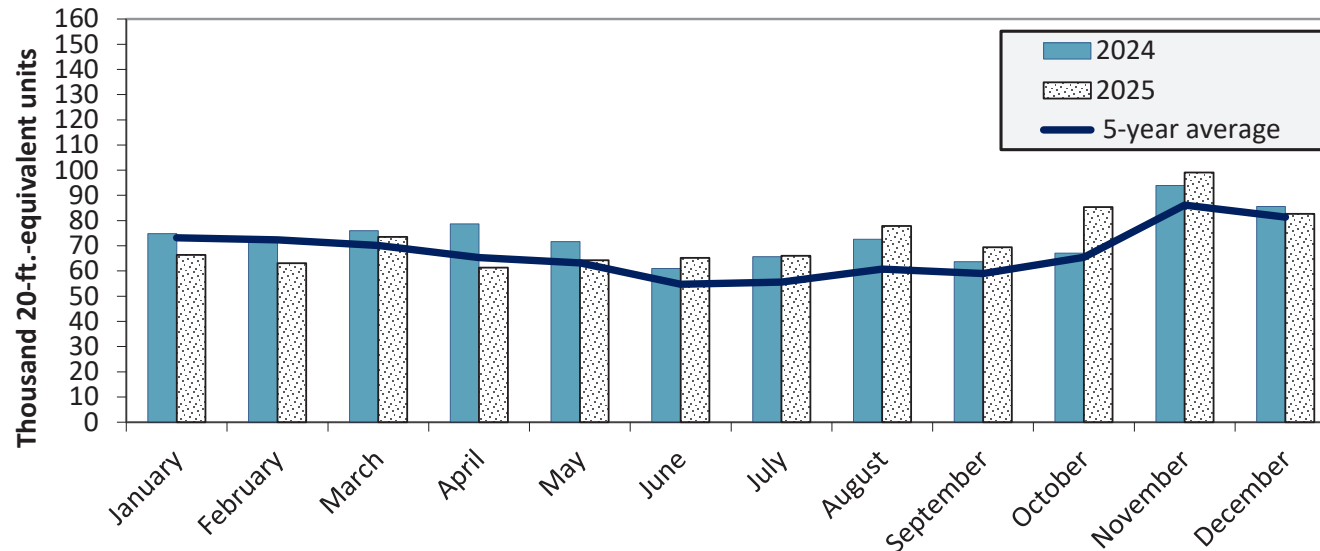
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Dec 2025



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 PERS 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 PERS data, S&P Global.

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