



Grain Transportation Report

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BNSF Recovers Track Near Easton, WA. BNSF Railway (BNSF) has [restored service](#) following a track washout near Easton, WA—halting flows along BNSF’s [Stampede Subdivision](#) in the Pacific Northwest (PNW) from March 20 to 28. The [washout](#) was about 600 feet long and 60 feet deep.

Westbound from Spokane, WA, three lines of BNSF track connect to PNW ports. According to data from RailState, loaded grain trains for export primarily use BNSF’s southernmost PNW route (via its Lakeside and Fallbridge subdivisions), whereas empty grain cars return along the middle Stampede route. To mitigate disruptions from the downed track, BNSF rerouted empty cars via its northernmost and southernmost tracks.

Year to date (through the week ending March 26), PNW exports were 11.3 mmt, up 13 percent from last year ([GTR table 18](#)).

GTR Tables 6 and 7 Reflect Updated Mileages on BNSF Routes. Newly updated with April tariffs and fuel surcharges, [GTR tables 6](#) and [7](#) have revised mileages on BNSF Railway (BNSF) routes (backdated to March 2026). Route mileages have a direct bearing on additional costs assessed to a shipper through mileage-based fuel surcharges. The mileages are captured as a variable in the raw data (available in various formats on the [GTR Datasets page](#) and [AgTransport](#)).

In emails to USDA, BNSF described its shift, in mid-2025, toward basing route mileages on actual miles traveled, instead of on the shortest

(ostensibly available) route. As this week’s first highlight illustrates, the shortest distance to reach the Pacific Northwest is BNSF’s northernmost route, but the actual route grain deliveries take is the southernmost path—about 200 miles longer. BNSF last revised its mileages in March and plans to update them annually.

Across the 44 BNSF-origin-destination combinations in GTR tables 6 and 7, BNSF’s mileages increased about 150 miles on average, adding only about \$15 per car with the April fuel surcharge of \$0.10 per car mile. However, from Salina, KS, to Houston, TX, a BNSF wheat train travels 1,136 miles—379 miles farther than its own shortest route (757 miles) and 371 miles farther than Union Pacific Railroad’s (UP) typical route (765 miles).

The increased mileage shrank BNSF’s cost advantage. In February, BNSF’s rate (tariff plus fuel surcharge) was \$2.00 cheaper per metric ton (mt) than UP from Salina to Houston—but \$1.77/mt cheaper in March—a cost-advantage drop of 11 percent.

The [grain rail tariff rates to the border dataset](#) (a subset of which is shown in [GTR table 8](#)) lists about 500 BNSF origin-destination routes per month. To streamline the update process, the dataset was built using the estimated shortest-distance route for a given origin-destination pair. For now, USDA will continue to implement that approach for the fuel surcharge calculation.

FMCSA Non-Domiciled CDL Final Rule Takes Effect. On March 16, the Federal Motor Carrier Safety Administration (FMCSA) [issued a final rule](#) narrowing eligibility for non-domiciled commercial driver’s licenses (CDLs) and learner’s permits (CLPs) to certain visa holders. (A non-domiciled person is one who does not live in a U.S. State.) FMCSA’s final rule replaces its September 29, 2025, interim final rule on non-domiciled CDLs and CLPs.

The rule affects how State Driver’s License Agencies issue these credentials, as well as which drivers motor carriers are legally allowed to use. As of March 16, States are no longer permitted to issue non-domiciled CDLs and CLPs that do not comply with the new standards.

FMCSA expects the rule to eliminate approximately 194,000 non-domiciled CDL drivers or 5 percent of the total active CDL holders. Industry estimates suggest that there could be a [15 to 25 percent workforce reduction](#) in some States, such as California, Arizona, and Texas. According to FMCSA, the rule “restores the integrity of the CDL system, closes a significant safety gap and enhances the safety of the traveling public.”

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 26, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2025/26 totaled 34.89 million metric tons (mmt), down 4 percent from last week and up 22 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26 were 1.15 mmt, down 6 percent from last week. Net [soybean export sales](#) were 0.35 mmt, down 47 percent from last week. Net [wheat export sales](#) were 0.024 mmt, down 94 percent from last week.

Rail

U.S. Class I railroads originated 27,818 [grain carloads](#) during the week ending March 21. This was a 9-percent decrease from the previous week, 7 percent more than last year, and 16 percent more than the 3-year average.

Average April [shuttle secondary railcar bids/offers](#) (per car) were \$538 above tariff for the week ending March 26. This was \$150 more than last week and \$328 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$92 above tariff. This was \$10 more than last week and \$33 lower than this week last year.

Barge

For the week ending March 28, [barged grain movements](#) totaled 691,308 tons. This was 11 percent more than the previous week and 1 percent more than the same week last year.

For the week ending March 28, 463 [barges moved down river](#), 76 more than the previous week. There were 695 grain barges unloaded in the New Orleans region, 7 percent fewer than the previous week.

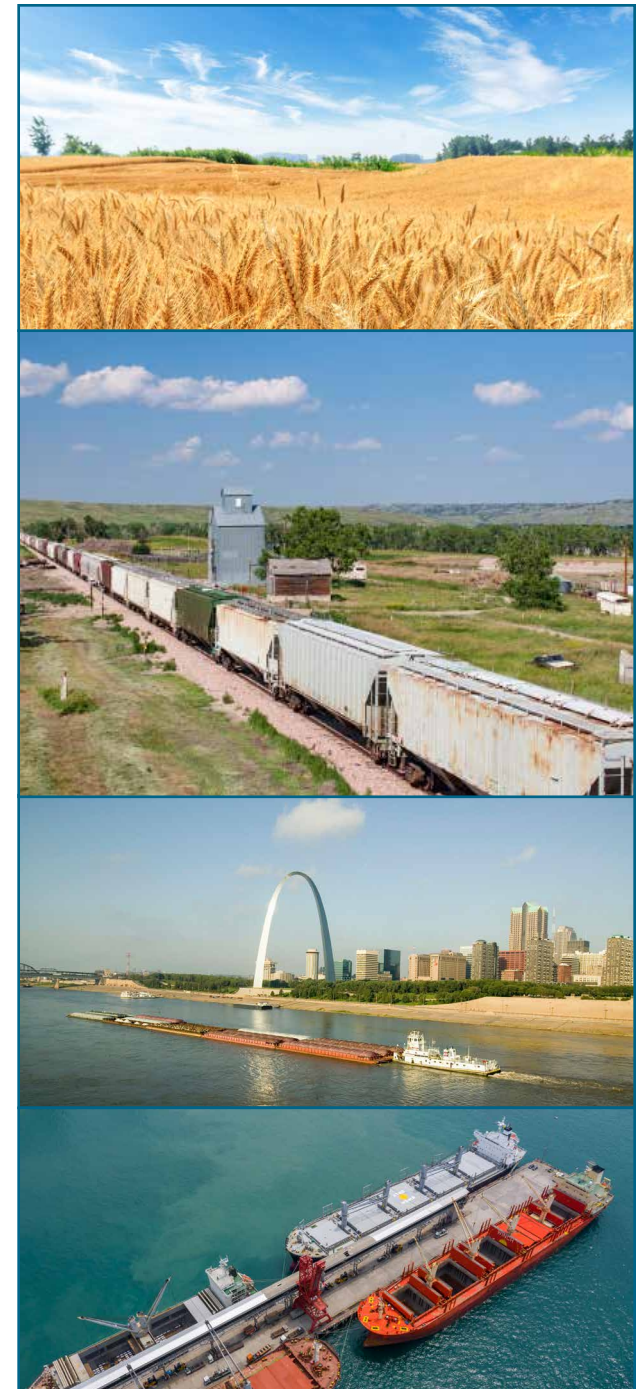
Ocean

For the week ending March 26, 33 [oceangoing grain vessels](#) were loaded in the Gulf—3 percent more than the same period last year. Within the next 10 days (starting March 27), 42 vessels were expected to be loaded—14 percent more than the same period last year.

As of March 26, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$61.25, down 2 percent from the previous week. The rate from the Pacific Northwest to Japan was \$34.00 per mt, down 1 percent from the previous week.

Fuel

For the week ending March 30, the [U.S. average diesel fuel price](#) increased 2.6 cents from the previous week to \$5.401 per gallon, 180.9 cents above the same week last year.



Fourth-Quarter 2025 Corn and Soybean Cost Indicators

Transportation costs for shipping corn and soybeans from Minneapolis, MN, to Japan via both the U.S. Gulf (Gulf route) and Pacific Northwest (PNW route) decreased both from third quarter to fourth quarter 2025 (quarter to quarter) and from fourth quarter 2024 to fourth quarter 2025 (year to year).

For shipping corn, total landed costs to Japan fell via both the Gulf and PNW routes, both quarter to quarter and year to year. For shipping soybeans, total landed costs rose slightly via the Gulf route, both quarter to quarter and year to year, and rose via the PNW route, both quarter to quarter and year to year (tables 1 and 2).

U.S. Gulf Costs

U.S. Gulf Transportation Costs.

Transportation costs for shipping corn and soybeans via the Gulf route fell 3 percent quarter to quarter, reflecting an 11-percent decrease in barge rates and 6-percent decrease in truck rates. Also, quarter to quarter, ocean freight rates rose 4 percent (table 1).

Table 1. Cost of shipping corn and soybeans from Minneapolis to Japan through the U.S. Gulf

	Corn					Soybeans				
	\$/metric ton			Percent change		\$/metric ton			Percent change	
	4th qtr. '24	3rd qtr. '25	4th qtr. '25	Yr. to yr.	Qtr. to qtr.	4th qtr. '24	3rd qtr. '25	4th qtr. '25	Yr. to yr.	Qtr. to qtr.
Truck	17.87	17.35	16.31	-8.73	-5.99	17.87	17.35	16.31	-8.73	-5.99
Barge	48.91	43.17	38.55	-21.18	-10.70	48.91	43.17	38.55	-21.18	-10.70
Ocean	49.74	54.35	56.35	13.29	3.68	49.74	54.35	56.35	13.29	3.68
Total transportation cost	116.52	114.87	111.21	-4.56	-3.19	116.52	114.87	111.21	-4.56	-3.19
Farm value	159.83	153.93	151.17	-5.42	-1.79	356.54	356.78	362.05	1.55	1.48
Total landed cost	276.35	268.8	262.38	-5.06	-2.39	473.06	471.65	473.26	0.04	0.34
Transportation % landed cost	42.16	42.73	42.39	0.52	-0.82	24.63	24.35	23.50	-4.60	-3.52

Note: Barge rates are from Minneapolis, MN, to the U.S. Gulf. USDA, National Agricultural Statistics Service is the source for corn and soybean prices. qtr. = quarter; yr. = year.

Source: USDA, Agricultural Marketing Service.

Table 2. Cost of shipping corn and soybeans from Minneapolis to Japan through the Pacific Northwest

	Corn					Soybeans				
	\$/metric ton			Percent change		\$/metric ton			Percent change	
	4th qtr. '24	3rd qtr. '25	4th qtr. '25	Yr. to yr.	Qtr. to qtr.	4th qtr. '24	3rd qtr. '25	4th qtr. '25	Yr. to yr.	Qtr. to qtr.
Truck	17.87	17.35	16.31	-8.73	-5.99	17.87	17.35	16.31	-8.73	-5.99
Rail	55.52	55.19	55.52	0.00	0.60	63.52	63.18	63.52	0.00	0.54
Ocean	28.96	29.08	29.29	1.14	0.72	28.96	29.08	29.29	1.14	0.72
Total transportation cost	102.35	101.62	101.12	-1.20	-0.49	110.35	109.61	109.12	-1.11	-0.45
Farm value	159.83	153.93	151.17	-5.42	-1.79	356.54	356.78	362.05	1.55	1.48
Total landed cost	262.18	255.55	252.29	-3.77	-1.28	466.89	466.39	471.17	0.92	1.02
Transportation % landed cost	39.04	39.77	40.08	2.67	0.79	23.64	23.50	23.16	-2.01	-1.46

Note: All rail tariffs include fuel surcharges and revisions for heavy axle rail cars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car. USDA, National Agricultural Statistics Service is the source for corn and soybean prices. qtr. = quarter; yr. = year.

Source: USDA, Agricultural Marketing Service.

Year to year, transportation costs for shipping corn and soybeans via the Gulf route fell 5 percent, reflecting a 21-percent drop in barge freight rates and 9-percent drop in truck freight rates ([table 1](#)). At \$56.35 per mt, the fourth-quarter 2025 ocean freight rate from the U.S. Gulf to Japan was up 13 percent year to year, reflecting rising demand for ocean transportation and tightening vessel availability ([Grain Transportation Report \(GTR\), February 5, 2026](#)).

U.S. Gulf Total Landed Costs. Fourth-quarter total landed costs for shipping via the Gulf route were \$262 per metric ton (mt) for corn and \$473 per mt for soybeans (fig. 1).

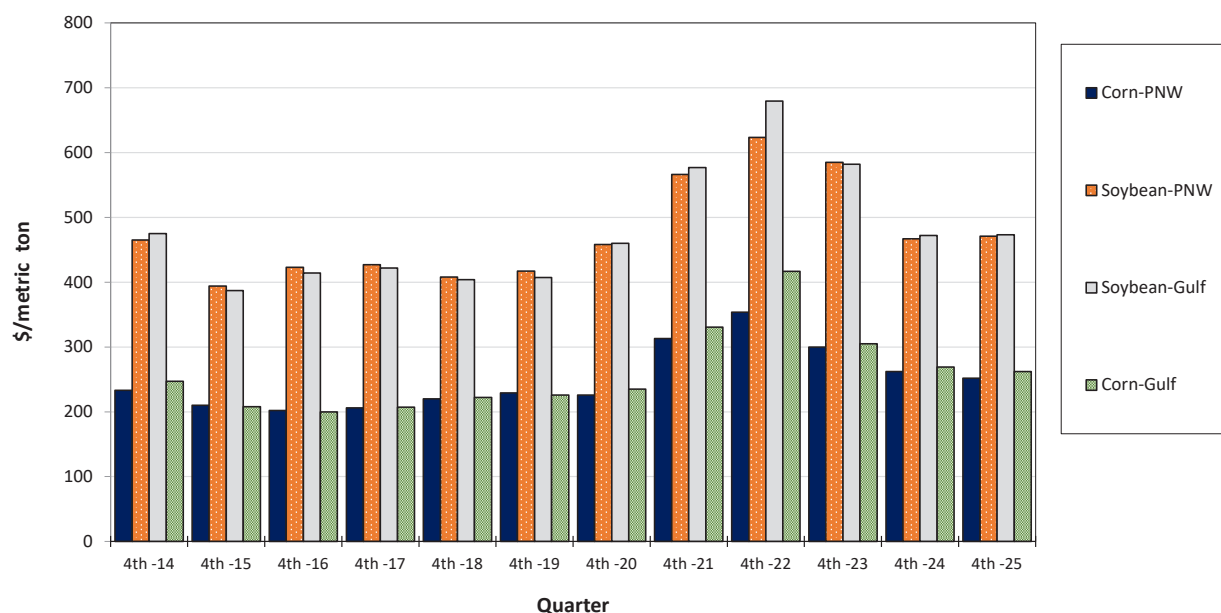
Of total landed costs, fourth-quarter transportation costs were 42 percent for shipping corn and 24 percent for shipping soybeans. Total landed costs for corn were down 2 percent quarter to quarter and down 5 percent year to year. Total landed costs for soybeans were up less than 1 percent both quarter to quarter and year to year.

For corn, drops in truck and barge freight rates and falling farm values drove both quarter-to-quarter and year-to-year declines in total landed costs. For soybeans, increased farm values drove both quarter-to-quarter and year-to-year rises in total landed costs.

Pacific Northwest Costs

PNW Transportation Costs. Quarter to quarter, transportation costs for shipping via the PNW route fell less than 1 percent for both

Figure 1. Corn and soybean total landed costs, fourth quarter



Note: Gulf = U.S. Gulf, PNW = Pacific Northwest
Source: USDA, Agricultural Marketing Service.

corn and soybeans. Also, over the same period, for both commodities, truck freight rates fell 6 percent, while rail freight rates rose 1 percent. PNW-to-Japan ocean freight rates averaged \$29.29 per mt—up 1 percent quarter to quarter.

Year to year, transportation costs decreased 1 percent each for corn and soybeans ([table 2](#)). Over the same period, truck freight rates fell 9 percent, while ocean freight rates rose 1 percent and rail rates were unchanged.

PNW Total Landed Costs. Total fourth-quarter 2025 landed costs for shipping via the PNW route were \$252 per mt for corn and \$471

per mt for soybeans (fig. 1). Quarter to quarter, total landed costs for shipping corn fell 1 percent and, for soybeans, rose 1 percent. Year to year, total landed costs decreased 4 percent for corn and rose 1 percent for soybeans.

Quarter to quarter, the decline in total landed cost for corn reflected lower truck freight rates and farm values that outweighed slight increases in rail and ocean freight rates. (Year to year, a decline in total landed costs for corn was due to lower truck freights rates and farm values.) The slight rises in soybean total landed costs (both quarter to quarter and year to year) reflected higher farm values ([table 2](#)).

Of total landed costs, transportation costs represented 40 percent for corn and 23 percent for soybeans.

Fourth-Quarter Corn and Soybean Exports and Projections

Fourth-Quarter Exports. According to [USDA's Global Agricultural Trade System \(GATS\)](#), fourth-quarter 2025 U.S. corn exports rose 48 percent from fourth quarter 2024,

driven by strong demand from Asia and Latin America. Fourth-quarter 2025 soybean exports fell 48 percent from the same quarter in 2024, reflecting reduced demand from China amid ongoing trade tensions and competitive Brazilian exports.

Marketing-Year Forecasts. According to USDA's March [World Agricultural Supply and Demand Estimates \(WASDE\)](#) report, U.S. corn exports for the current marketing year (MY

2025/26) are projected to be up 15 percent from MY 2024/25 (unchanged from February's forecast). U.S. soybean exports for MY 2025/26 are projected to decrease 16 percent from MY 2024/25 (also unchanged from February's forecast), reflecting a probability of lower shipments to China and increased competition from South American exports.

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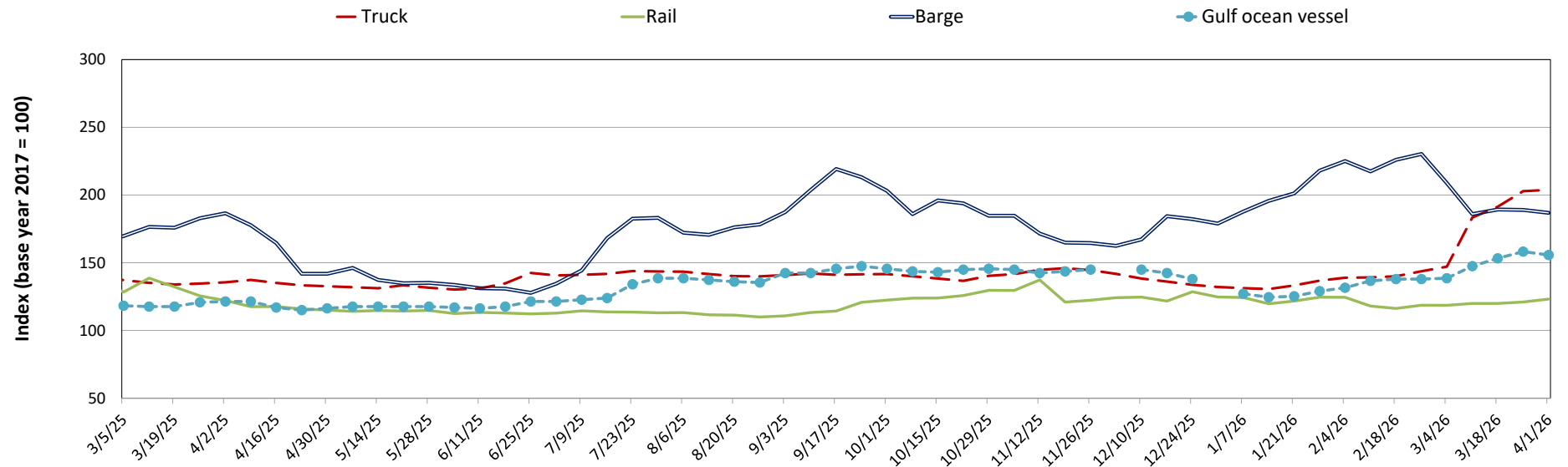
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
04/01/26	204	123	187	156	162
03/25/26	203	121	189	158	163
04/02/25	136	122	187	121	133

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.

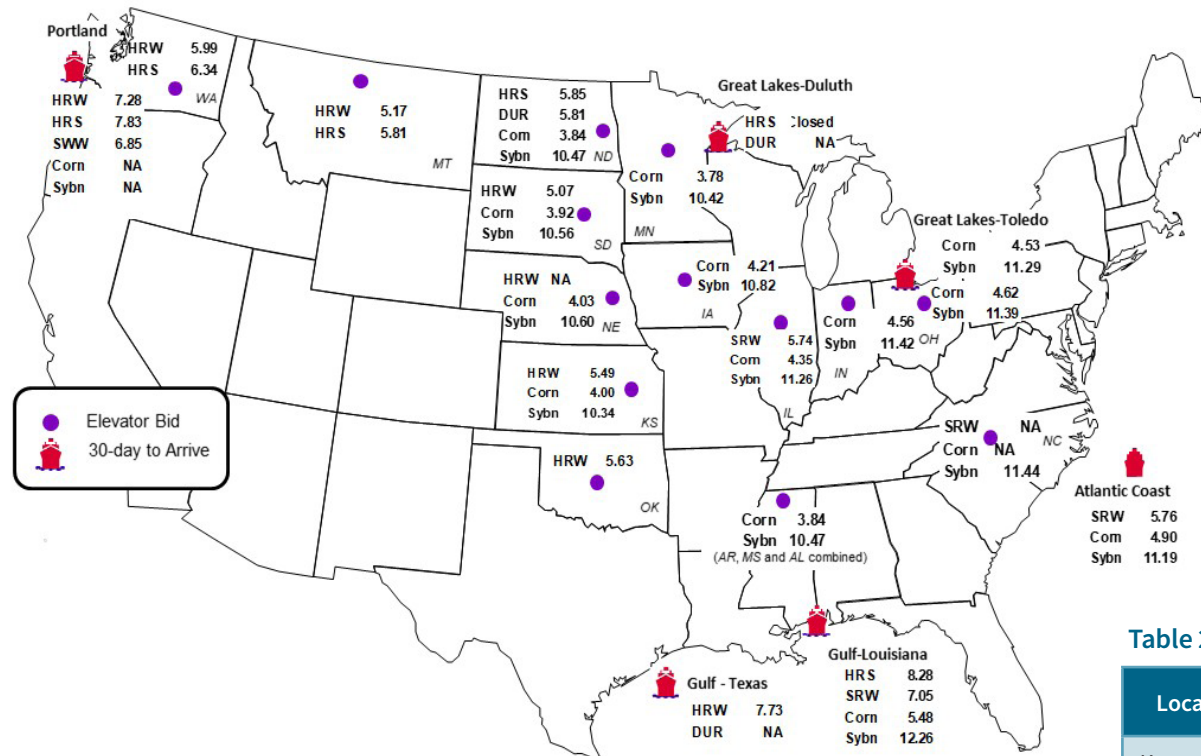
Figure 1. Grain transportation cost indicators as of week ending 4/1/26



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	3/27/2026	3/20/2026
Corn	IL-Gulf	-1.13	-1.07
Corn	NE-Gulf	-1.45	-1.39
Soybean	IA-Gulf	-1.44	-1.46
HRW	KS-Gulf	-2.24	-2.29
HRS	ND-Portland	-1.98	-1.93

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	3/27/2026	Week ago 3/20/2026	Year ago 3/28/2025
Kansas City	Wheat	May	6.326	6.060	5.522
Minneapolis	Wheat	May	6.483	6.280	5.810
Chicago	Wheat	May	6.048	5.950	5.282
Chicago	Corn	May	4.620	4.652	4.512
Chicago	Soybean	May	11.592	11.612	10.266

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.

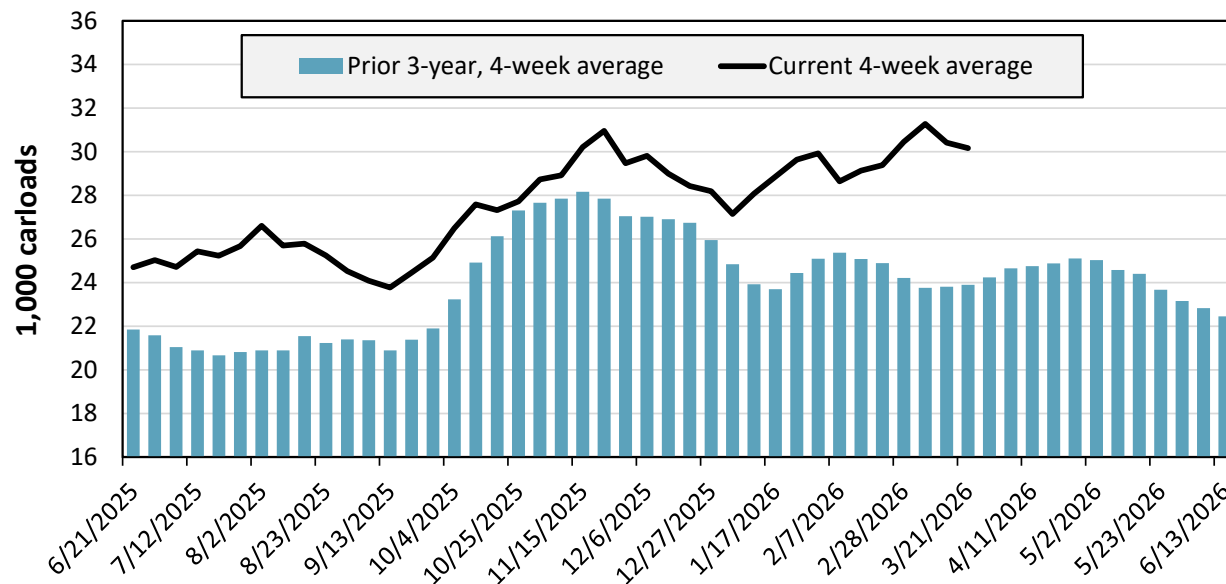
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 3/21/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,660	2,696	12,740	5,893	2,899	1,930	27,818
This week last year	1,353	2,792	12,383	5,643	2,446	1,396	26,013
2026 YTD	16,874	30,033	145,742	78,197	39,185	20,107	330,138
2025 YTD	20,512	34,364	126,701	65,991	28,931	15,882	292,381
2026 YTD as % of 2025 YTD	82	87	115	118	135	127	113
Last 4 weeks as % of 2025	93	104	118	119	134	144	118
Last 4 weeks as % of 3-yr. avg.	88	106	132	122	142	160	126
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 21, grain carloads were down 1 percent from the previous week, up 18 percent from last year, and up 26 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: 3/20/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	52.3	32.8	33.1	17.6	13.4	16.5	27.6
	Average over last 4 weeks	37.3	29.1	21.8	18.8	13.0	21.5	23.6
	Average of same 4 weeks last year	27.1	29.5	43.3	19.5	13.1	n/a	26.5
Average grain unit train speeds (miles per hour)	This week	22.5	18.0	23.8	22.9	22.2	17.9	21.2
	Average over last 4 weeks	22.5	18.5	24.3	23.3	22.7	19.0	21.7
	Average of same 4 weeks last year	21.8	19.2	24.2	21.3	23.9	n/a	22.0

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

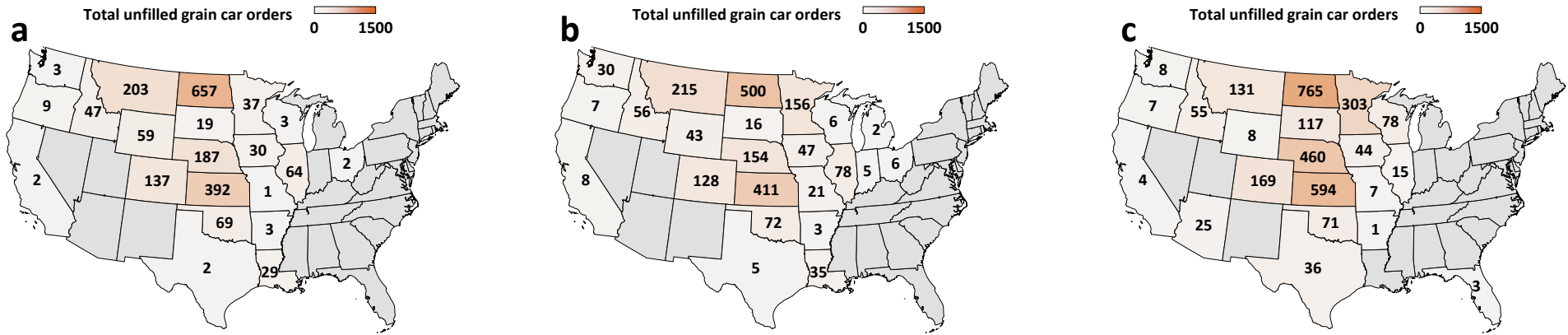
For the week ending: 3/20/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	45	10	415	56	9	308	844
	Average over last 4 weeks	46	8	347	63	6	229	699
	Average of same 4 weeks last year	67	7	542	97	12	n/a	724
Average number of loaded grain cars not moved in over 48 hours	This week	59	234	744	72	18	344	1,471
	Average over last 4 weeks	60	166	519	58	19	373	1,194
	Average of same 4 weeks last year	112	177	870	85	8	n/a	1,252
Average number of grain unit trains held	This week	0	0	11	4	1	5	21
	Average over last 4 weeks	0	0	5	4	1	5	15
	Average of same 4 weeks last year	1	0	25	10	1	n/a	36
Total unfilled manifest grain car orders	This week	2	12	956	777	0	208	1,955
	Average over last 4 weeks	11	23	816	925	0	253	2,028
	Average of same 4 weeks last year	3	1	932	1,371	0	n/a	2,305

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](#).

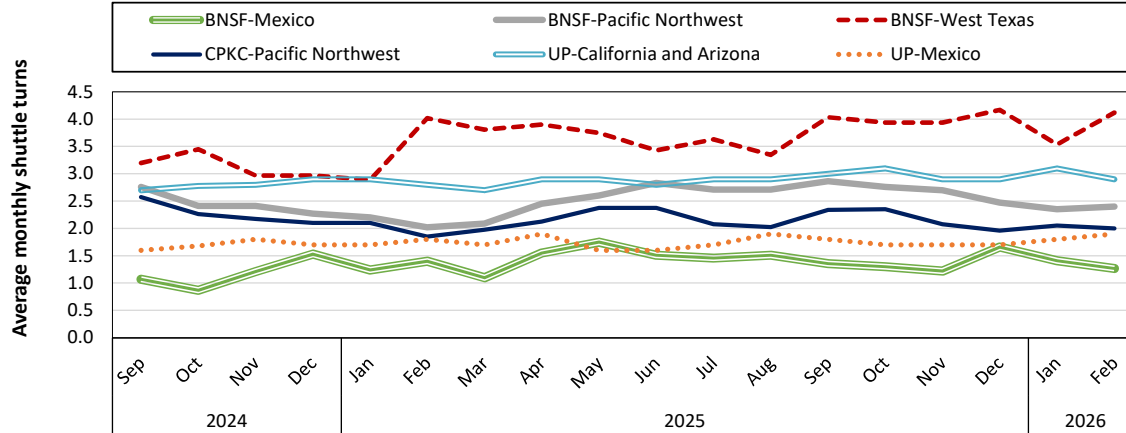
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 3/20/2026 (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

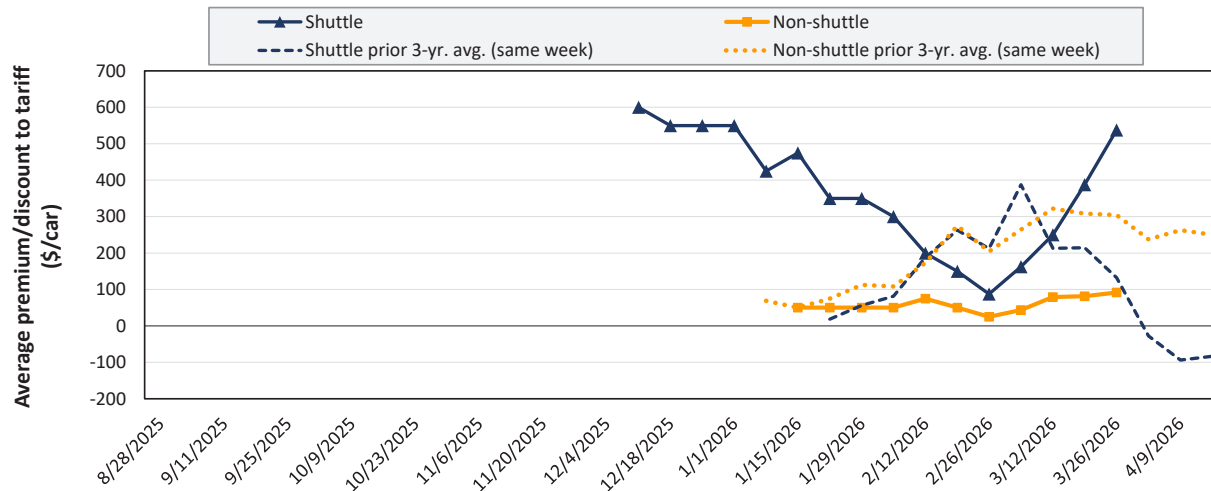


In February 2026, BNSF Railway's average monthly grain shuttle turns were 1.3 to Mexico, 2.4 to the Pacific Northwest, and 4.1 to West Texas. CPKC's shuttle turns averaged 2 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.9 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](https://www.agtransport.com/). BNSF = BNSF Railway; CPKC = Canadian Pacific Kansas City; UP = Union Pacific Railroad.
Source: Surface Transportation Board.

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



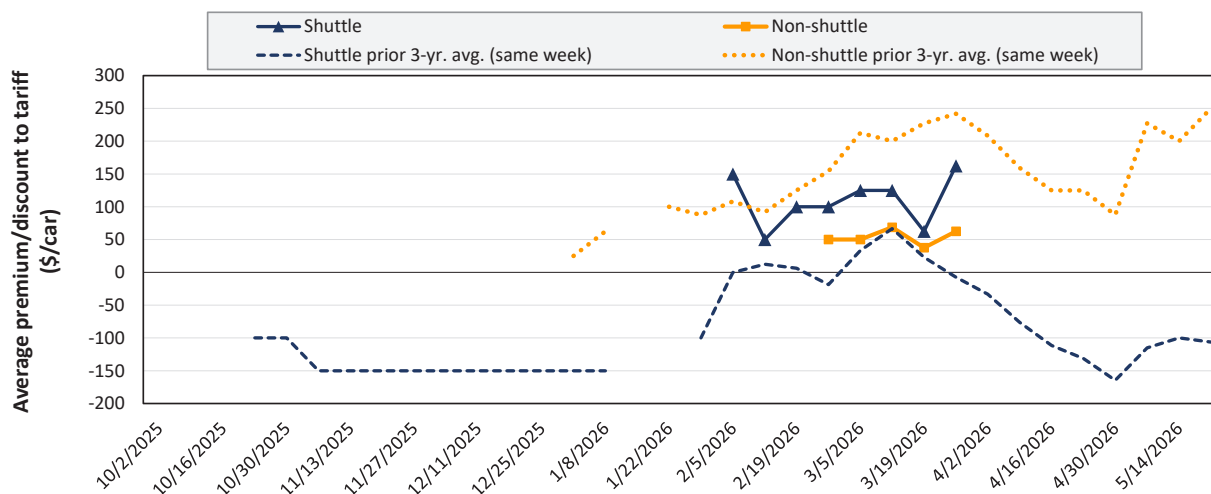
Average non-shuttle bids/offers rose \$10 this week, and are at the peak.

Average shuttle bids/offers rose \$150 this week and are \$63 below the peak.

3/26/2026	BNSF	UP
Non-Shuttle	\$33	\$150
Shuttle	\$700	\$375

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 May 2026



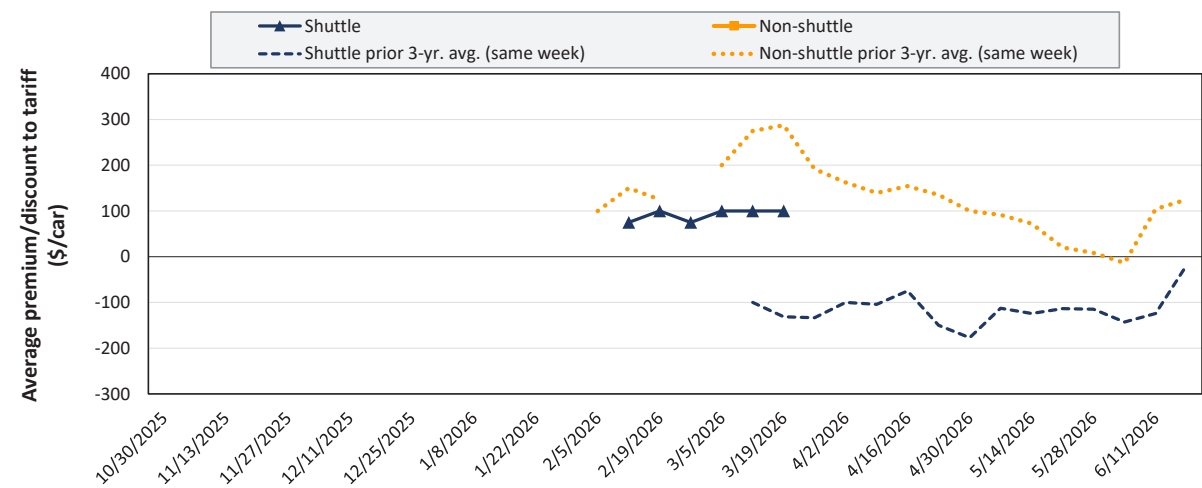
Average non-shuttle bids/offers rose \$25 this week, and are \$6 below the peak.

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

3/26/2026	BNSF	UP
Non-Shuttle	\$25	\$100
Shuttle	\$225	\$100

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 June 2026



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

There were no shuttle bids/offers this week.

3/26/2026	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	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. 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: 3/26/2026		Delivery period					
		Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26
Non-shuttle	BNSF	n/a	33	25	n/a	n/a	n/a
	Change from last week	n/a	8	0	n/a	n/a	n/a
	Change from same week 2025	n/a	-92	-75	n/a	n/a	n/a
	UP	n/a	150	100	n/a	n/a	n/a
	Change from last week	n/a	12	50	n/a	n/a	n/a
	Change from same week 2025	n/a	25	0	n/a	n/a	n/a
Shuttle	BNSF	600	700	225	n/a	0	n/a
	Change from last week	100	175	100	n/a	n/a	n/a
	Change from same week 2025	150	390	81	n/a	n/a	n/a
	UP	575	375	100	n/a	n/a	n/a
	Change from last week	75	125	100	n/a	n/a	n/a
	Change from same week 2025	n/a	267	175	n/a	n/a	n/a
	CPKC	0	113	100	n/a	n/a	n/a
	Change from last week	-100	113	0	n/a	n/a	n/a
	Change from same week 2025	-300	113	200	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, April 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	\$123.40	\$5,955.40	\$1.61	\$59.14	3.3
	BNSF	Williston, ND	Superior, WI	Shuttle	\$4,291	\$61.70	\$4,352.70	\$1.18	\$43.22	4.7
	CPKC	Westby, MT	St. Louis, MO	Unit	\$5,788	\$845.61	\$6,633.61	\$1.79	\$65.87	10.0
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	\$4,804	\$71.50	\$4,875.50	\$1.32	\$48.42	4.1
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	\$6,215	\$171.90	\$6,386.90	\$1.73	\$63.43	3.3
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	\$2,865	\$33.20	\$2,898.20	\$0.78	\$28.78	7.4
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	\$5,732	\$178.90	\$5,910.90	\$1.60	\$58.70	5.5
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	\$5,838	\$151.40	\$5,989.40	\$1.62	\$59.48	3.7
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	\$5,412	\$125.60	\$5,537.60	\$1.50	\$54.99	4.0
	CPKC	Minot, ND	Kalama, WA	Unit	\$5,298	\$748.70	\$6,046.70	\$1.63	\$60.05	2.6
	CPKC	Nekoma, ND	Chicago, IL	Manifest	\$5,030	\$449.96	\$5,479.96	\$1.48	\$54.42	8.2
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	\$3,400	\$65.00	\$3,465.00	\$0.94	\$34.41	-11.5
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	\$3,600	\$79.70	\$3,679.70	\$0.99	\$36.54	-13.6
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	\$5,800	\$214.80	\$6,014.80	\$1.63	\$59.73	-12.9
	BNSF	Garden City, KS	San Bernardino, CA	DET	\$5,700	\$151.00	\$5,851.00	\$1.58	\$58.10	-0.5
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,200	\$110.00	\$4,310.00	\$1.16	\$42.80	-11.6
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,000	\$113.60	\$4,113.60	\$1.11	\$40.85	-12.3
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	\$3,500	\$93.60	\$3,593.60	\$0.97	\$35.69	-14.2
	BNSF	Wichita, KS	Chicago, IL	DET	\$3,700	\$63.80	\$3,763.80	\$1.02	\$37.38	-12.2
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	\$3,900	\$101.80	\$4,001.80	\$1.08	\$39.74	-10.7
	UP	Byers, CO	Houston, TX	Shuttle	\$4,525	\$383.79	\$4,908.79	\$1.33	\$48.75	-7.3
	UP	Goodland, KS	Kansas City, MO	Manifest	\$4,967	\$143.55	\$5,110.55	\$1.38	\$50.75	1.9
	UP	Medford, OK	Houston, TX	Shuttle	\$3,775	\$189.42	\$3,964.42	\$1.07	\$39.37	-9.0
	UP	Salina, KS	Houston, TX	Shuttle	\$4,025	\$252.45	\$4,277.45	\$1.16	\$42.48	-8.4
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	\$4,791	\$77.20	\$4,868.20	\$1.32	\$48.34	4.1
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	\$4,439	\$97.50	\$4,536.50	\$1.23	\$45.05	5.0
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	\$2,032	\$48.00	\$2,080.00	\$0.56	\$20.66	0.5
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, April 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	\$111.30	\$5,711.30	\$1.44	\$56.72	-3.5
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	\$5,470	\$191.40	\$5,661.40	\$1.43	\$56.22	0.1
	BNSF	Edison, NE	Hanford, CA	Railroad	\$5,460	\$184.40	\$5,644.40	\$1.42	\$56.05	-8.9
	BNSF	Edison, NE	Hereford, TX	Railroad	\$4,500	\$78.60	\$4,578.60	\$1.15	\$45.47	-10.6
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	\$5,350	\$211.40	\$5,561.40	\$1.40	\$55.23	0.3
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	\$4,620	\$94.10	\$4,714.10	\$1.19	\$46.81	1.1
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	\$4,260	\$76.80	\$4,336.80	\$1.09	\$43.07	-11.2
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	\$4,000	\$118.20	\$4,118.20	\$1.04	\$40.90	-11.3
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	\$5,430	\$166.50	\$5,596.50	\$1.41	\$55.58	0.2
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	\$5,430	\$188.70	\$5,618.70	\$1.42	\$55.80	0.1
	CN	Gibson City, IL	Reserve, LA	Private	\$2,301	\$321.90	\$2,622.90	\$0.66	\$26.05	9.4
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,681	\$321.90	\$3,002.90	\$0.76	\$29.82	8.1
	CPKC	Delhi, LA	Morton, MS	Railroad	\$1,342	\$47.60	\$1,389.60	\$0.35	\$13.80	0.1
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,047	\$861.05	\$5,908.05	\$1.49	\$58.67	7.4
	CPKC	Glenwood, MN	Boardman, OR	Railroad	\$5,513	\$828.57	\$6,341.57	\$1.60	\$62.97	6.6
	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	\$228.03	\$4,163.03	\$1.05	\$41.34	-3.3
	UP	Frankfort, KS	Calipatria, CA	Railroad	\$5,855	\$518.76	\$6,373.76	\$1.61	\$63.29	-2.1
Soybeans	UP	Mead, NE	Keyes, CA	Railroad	\$6,015	\$573.21	\$6,588.21	\$1.66	\$65.42	-2.0
	UP	Nebraska City, NE	Amarillo, TX	Railroad	\$4,855	\$235.62	\$5,090.62	\$1.28	\$50.55	-2.7
	UP	Sloan, IA	Burley, ID	Railroad	\$5,535	\$388.08	\$5,923.08	\$1.49	\$58.82	-2.3
	UP	Sterling, IL	Nashville, AR	Railroad	\$4,075	\$238.59	\$4,313.59	\$1.09	\$42.84	-3.2
	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	\$6,135	\$174.60	\$6,309.60	\$1.71	\$62.66	0.1
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	\$5,185	\$166.10	\$5,351.10	\$1.45	\$53.14	-22.0
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	\$6,085	\$169.10	\$6,254.10	\$1.69	\$62.11	0.1
	BNSF	Casselton, ND	St. Louis, MO	Railroad	\$3,400	\$88.80	\$3,488.80	\$0.94	\$34.65	-0.2
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	\$6,185	\$210.40	\$6,395.40	\$1.73	\$63.51	0.5
	CN	Gibson City, IL	Reserve, LA	Private	\$2,301	\$321.90	\$2,622.90	\$0.71	\$26.05	9.4
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,681	\$321.90	\$3,002.90	\$0.81	\$29.82	8.1
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,785	\$861.05	\$6,646.05	\$1.80	\$66.00	6.5
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	\$3,526	\$650.72	\$4,176.72	\$1.13	\$41.48	7.9
	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	\$246.51	\$3,896.51	\$1.05	\$38.69	-27.7
	UP	Cozad, NE	Kalama, WA	Railroad	\$5,140	\$515.46	\$5,655.46	\$1.53	\$56.16	-14.8
	UP	Cozad, NE	Houston, TX	Railroad	\$4,010	\$355.74	\$4,365.74	\$1.18	\$43.35	-25.4
	UP	Sloan, IA	Ama, LA	Railroad	\$4,090	\$406.23	\$4,496.23	\$1.22	\$44.65	-24.9

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](#).

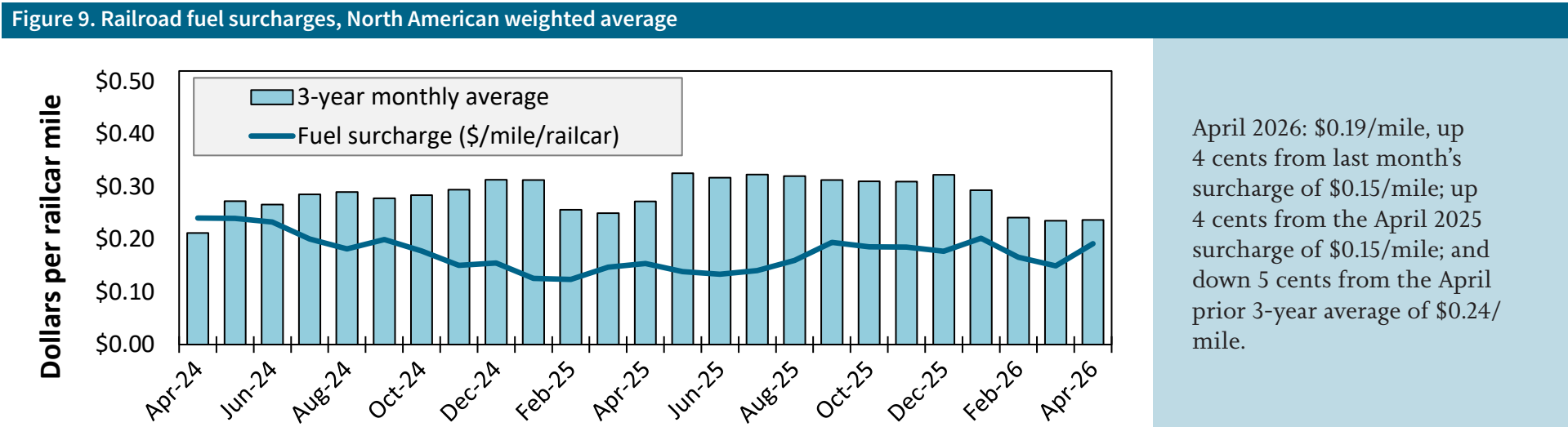
Source: BNSF Railway, Canadian National Railway, CPKC, CSX Transportation, and Union Pacific Railroad.

Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, April 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	\$128	\$4,769	\$1.19	\$46.94	1.4%
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	\$5,080	\$514	\$5,594	\$1.40	\$55.06	0.2%
	Council Bluffs, IA	Laredo, TX	CPKC	Non-shuttle	\$5,550	\$569	\$6,119	\$1.53	\$60.22	0.2%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,005	\$491	\$5,496	\$1.37	\$54.09	0.2%
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	\$5,190	\$521	\$5,711	\$1.43	\$56.21	0.2%
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	\$4,535	\$421	\$4,956	\$1.24	\$48.78	-2.7%
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	\$4,655	\$438	\$5,093	\$1.27	\$50.13	-2.6%
Soybeans	Superior, NE	El Paso, TX	BNSF	Shuttle	\$4,622	\$101	\$4,723	\$1.18	\$46.48	-7.6%
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	\$5,080	\$514	\$5,594	\$1.50	\$55.06	0.2%
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	\$4,325	\$109	\$4,434	\$1.19	\$43.64	-18.6%
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	\$4,950	\$401	\$5,351	\$1.43	\$52.66	-19.4%
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	\$4,325	\$108	\$4,433	\$1.19	\$43.63	-18.6%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,005	\$491	\$5,496	\$1.47	\$54.09	0.2%
Wheat	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	\$5,035	\$420	\$5,455	\$1.46	\$53.69	-19.1%
	FT Worth, TX	El Paso, TX	BNSF	DET	\$3,000	\$79	\$3,079	\$0.82	\$30.30	-25.3%
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	\$2,800	\$79	\$2,879	\$0.77	\$28.34	-21.9%
	Great Bend, KS	Laredo, TX	UP	Shuttle	\$4,099	\$301	\$4,400	\$1.18	\$43.31	-8.7%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,005	\$491	\$5,496	\$1.47	\$54.09	0.2%
	Wichita, KS	Laredo, TX	UP	Shuttle	\$4,024	\$265	\$4,289	\$1.15	\$42.21	-6.8%

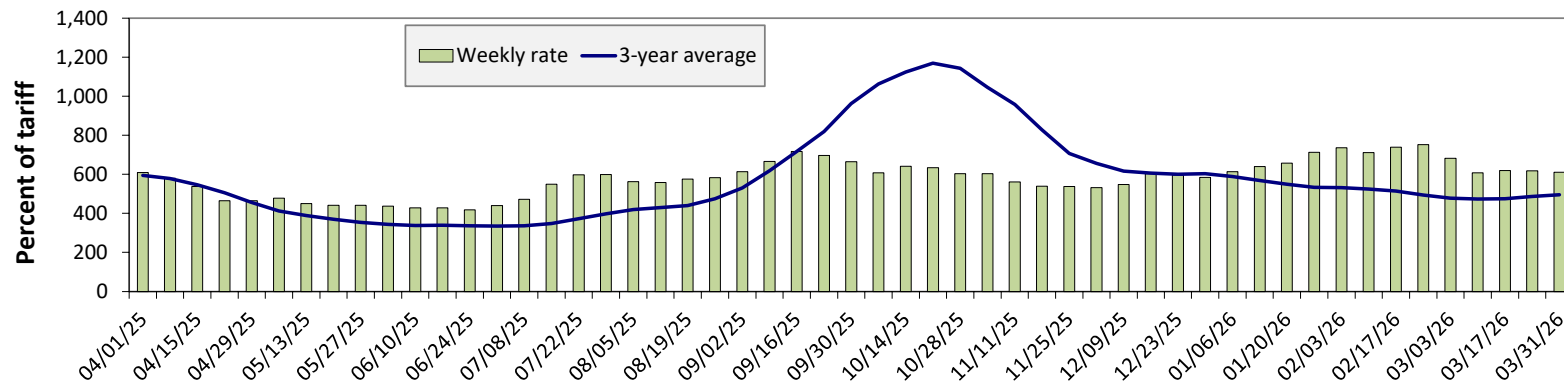
Note: After December 2021, U.S. railroads stopped reporting "through rates" from the U.S. origin to the Mexican destination. Thus, the table shows "Rule 11 rates," which cover only the portion of the shipment from a U.S. origin to locations on the U.S.-Mexico border. The Rule 11 rates apply only to shipments 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).



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 31: 1 percent lower than the previous week; there is no change from last year; and 23 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	3/31/2026	710	673	611	453	496	383
	3/24/2026	658	632	618	448	525	370
\$/ton	3/31/2026	43.95	35.80	28.35	18.07	23.26	12.03
	3/24/2026	40.73	33.62	28.68	17.88	24.62	11.62
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	18	11	0	6	20	7
	3-year avg.	36	34	23	22	27	24
Rate	April	681	633	593	445	478	373
	June	631	584	520	417	447	336

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](#).

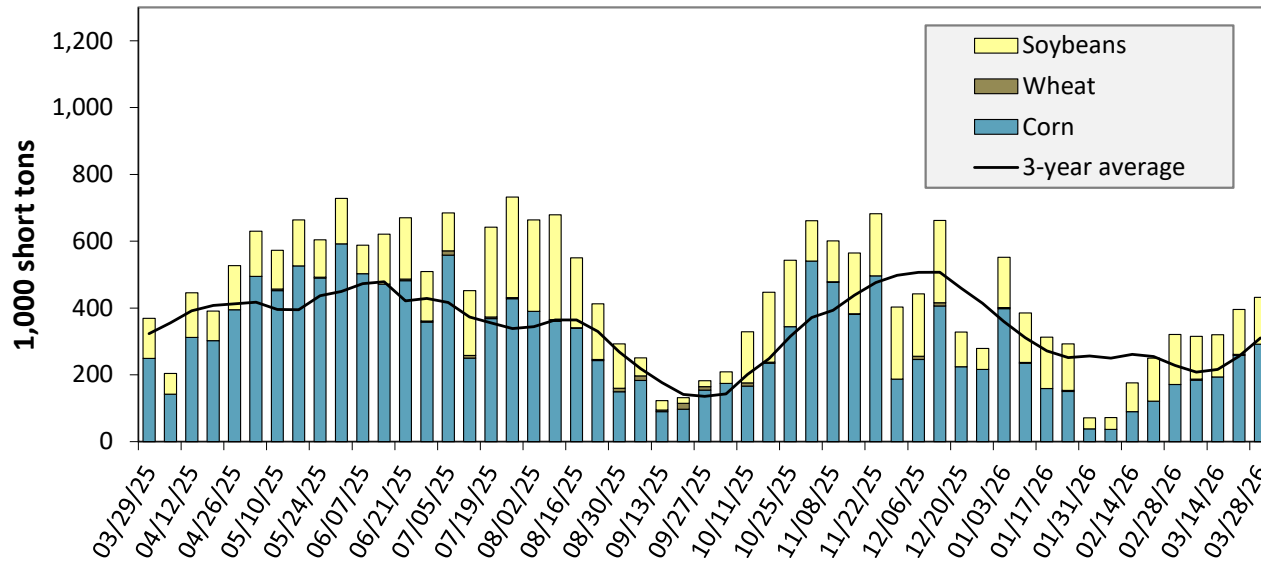
Source: USDA, Agricultural Marketing Service.

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 28: 17 percent higher than last year and 39 percent higher than the 3-year average.

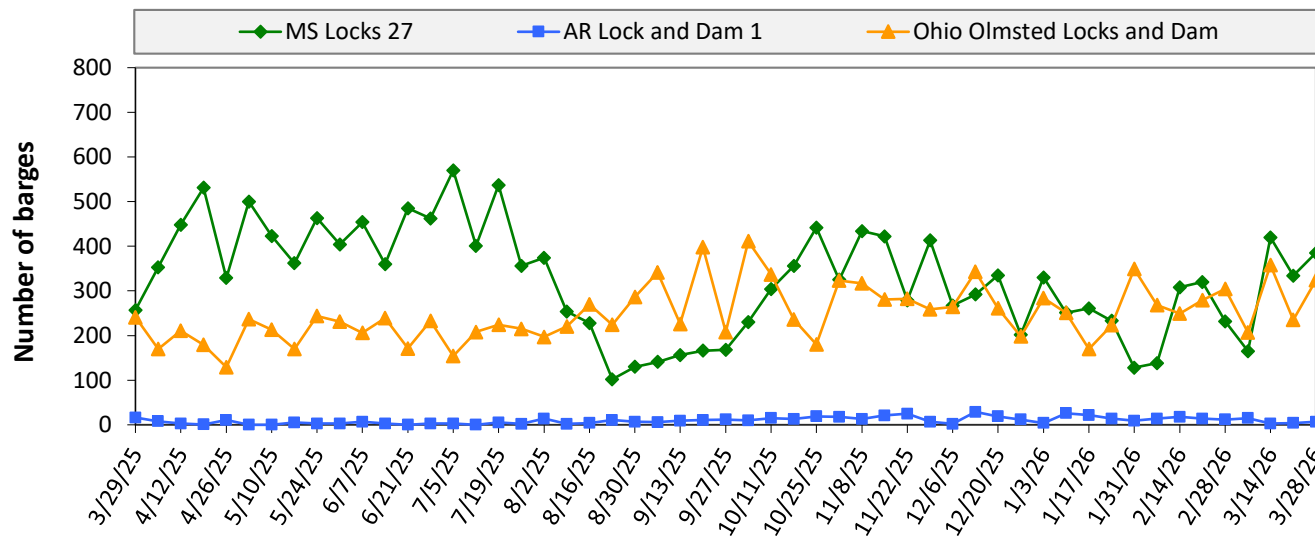
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 03/28/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	44	0	8	0	52
Mississippi River (Winfield, MO (L25))	114	0	70	0	184
Mississippi River (Alton, IL (L26))	313	0	148	0	461
Mississippi River (Granite City, IL (L27))	292	0	140	0	432
Illinois River (La Grange)	183	0	71	0	254
Ohio River (Olmsted)	151	8	59	0	218
Arkansas River (L1)	0	21	20	0	42
Weekly total - 2026	443	29	219	0	691
Weekly total - 2025	401	22	256	7	686
2026 YTD	3,164	210	2,550	28	5,952
2025 YTD	4,066	249	3,070	71	7,456
2026 as % of 2025 YTD	78	84	83	39	80
Last 4 weeks as % of 2025	93	96	108	34	97
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.

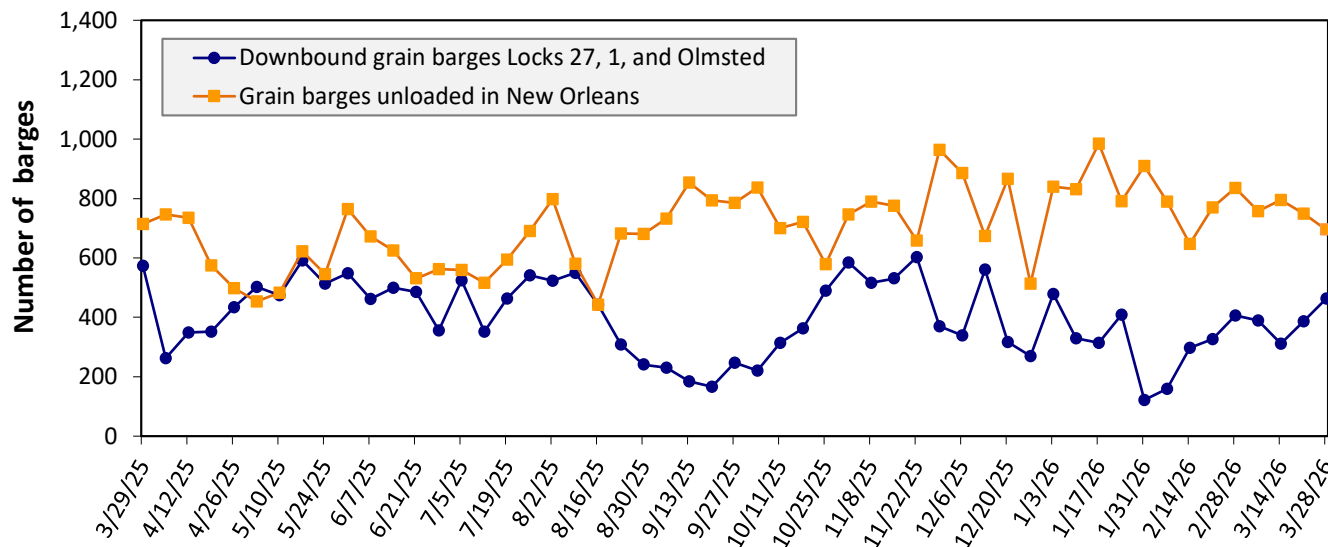
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending March 28: 716 barges transited the locks, 143 barges more than the previous week, and 22 percent higher than the 3-year average.

Source: U.S. Army Corps of Engineers.

Figure 14. Grain barges for export in New Orleans region



For the week ending March 28: 463 barges moved down river, 76 more than the previous week; 695 grain barges unloaded in the New Orleans Region, 7 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	
		April 2026	March 2026	April 2025	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$22.63	\$22.16	\$21.57	4.9	7.6
	Central Ferry, WA/Almota, WA	\$21.70	\$21.23	\$20.67	5.0	7.6
	Lyons Ferry, WA	\$20.65	\$20.18	\$19.66	5.0	7.5
	Windust, WA/Lower Monumental, WA	\$19.58	\$19.11	\$18.63	5.1	7.4
	Sheffler, WA	\$19.55	\$19.08	\$18.60	5.1	7.5
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$18.31	\$17.84	\$17.40	5.2	7.4
	Port Kelly, WA/Wallula, WA	\$18.08	\$17.61	\$17.18	5.2	7.4
	Umatilla, OR	\$17.98	\$17.51	\$17.08	5.3	7.4
	Boardman, OR/Hogue Warner, OR	\$17.71	\$17.24	\$16.82	5.3	7.4
	Arlington, OR/Roosevelt, WA	\$17.55	\$17.08	\$16.66	5.3	7.4
	Biggs, OR	\$16.17	\$15.70	\$15.33	5.5	7.3
	The Dalles, OR	\$15.03	\$14.56	\$14.23	5.6	7.2

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

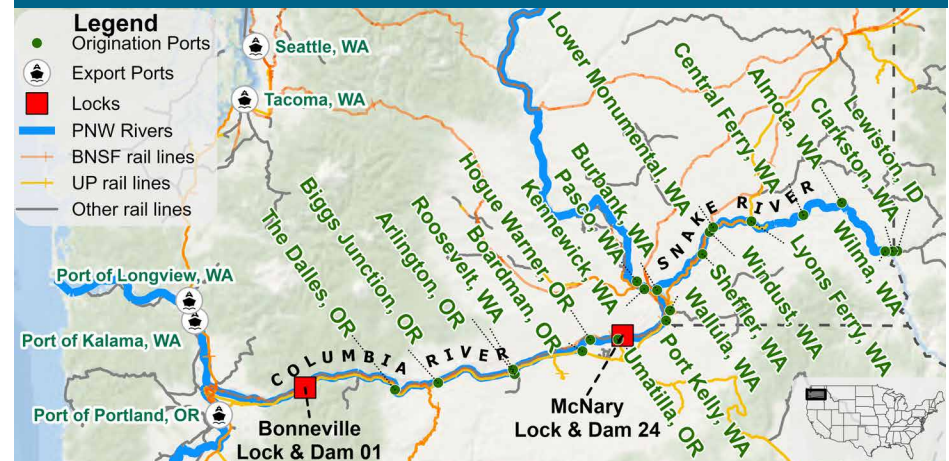
Table 12. Monthly barged grain movements, Columbia-Snake (1,000 tons)

March, 2026	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	0	0	0
Columbia River (Bonneville Lock and Dam (L1))	4	0	4
Monthly total 2026	4	0	4
Monthly total 2025	148	0	148
2026 YTD	769	0	769
2025 YTD	905	0	905

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.

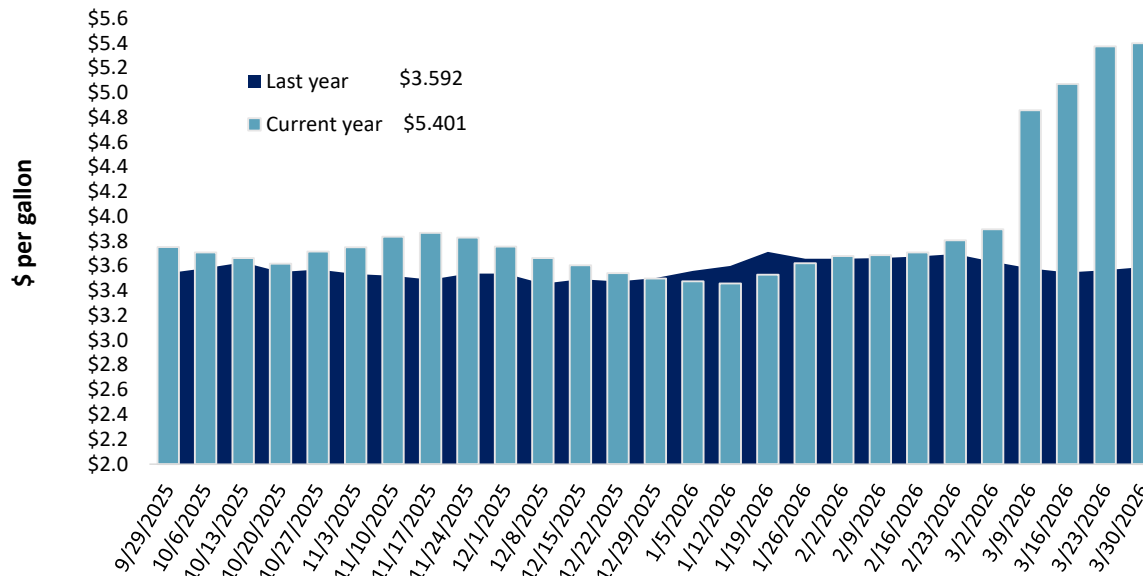
Table 13. Retail on-highway diesel prices, week ending 3/30/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	5.535	0.055	1.840
	New England	5.825	0.066	1.842
	Central Atlantic	5.834	0.205	1.965
	Lower Atlantic	5.394	-0.001	1.793
II	Midwest	5.105	-0.055	1.586
III	Gulf Coast	5.105	-0.029	1.823
IV	Rocky Mountain	5.270	0.096	1.798
V	West Coast	6.596	0.286	2.337
	West Coast less California	6.056	0.230	2.245
	California	7.219	0.349	2.443
Total	United States	5.401	0.026	1.809

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 30, the U.S. average diesel fuel price increased 2.6 cents from the previous week to \$5.401 per gallon, 180.9 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 3/26/2026	1,288	602	1,249	999	121	4,259	22,893	7,730	34,882
	This week year ago	1,285	504	1,155	1,081	68	4,093	19,221	5,234	28,548
	Last 4 wks. as % of same period 2024/25	97	119	107	89	171	102	123	161	127
Current shipped (cumulative) exports sales	2025/26 YTD	7,277	2,703	5,038	4,367	467	19,852	47,132	29,880	96,863
	2024/25YTD	3,395	2,286	4,739	4,247	235	14,901	33,049	37,660	85,610
	YTD 2025/26 as % of 2024/25	214	118	106	103	199	133	143	79	113
	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 3/26/2026	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	21,003	18,896	11	19,839
Japan	11,475	8,897	29	10,478
Colombia	5,789	5,334	9	5,493
China	0	0	-100	3,461
Korea	6,805	3,589	90	3,127
Top 5 importers	38,267	33,127	16	39,272
Total U.S. corn export sales	70,025	52,270	34	54,276
% of YTD current month's export projection	84%	72%	-	-
Change from prior week	1,149	-790	-	-
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 3/26/2026	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	11,384	21,342	-47	26,078
Mexico	4,588	3,976	15	4,762
Japan	1,701	1,559	9	2,107
Egypt	4,226	2,606	62	2,098
Indonesia	1,794	1,380	30	1,997
Top 5 importers	23,693	30,863	-23	37,042
Total U.S. soybean export sales	37,610	42,893	-12	48,941
% of YTD current month's export projection	88%	84%	-	-
Change from prior week	353	-2,678	-	-
Top 5 importers' share of U.S. soybean export sales	63%	72%	-	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 3/26/2026	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	4,453	3,751	19	3,358
Philippines	2,910	2,505	16	2,473
Japan	2,102	2,035	3	2,045
China	336	67	399	1,137
Korea	1,872	2,267	-17	1,674
Taiwan	975	1,010	-3	935
Thailand	657	593	11	667
Nigeria	1,459	582	151	629
Indonesia	1,070	681	57	518
Colombia	702	419	68	489
Top 10 importers	16,536	13,910	19	13,926
Total U.S. wheat export sales	24,110	18,995	27	19,135
% of YTD current month's export projection	98%	84%	-	-
Change from prior week	24	-1,905	-	-
Top 10 importers' share of U.S. wheat export sales	69%	73%	-	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)

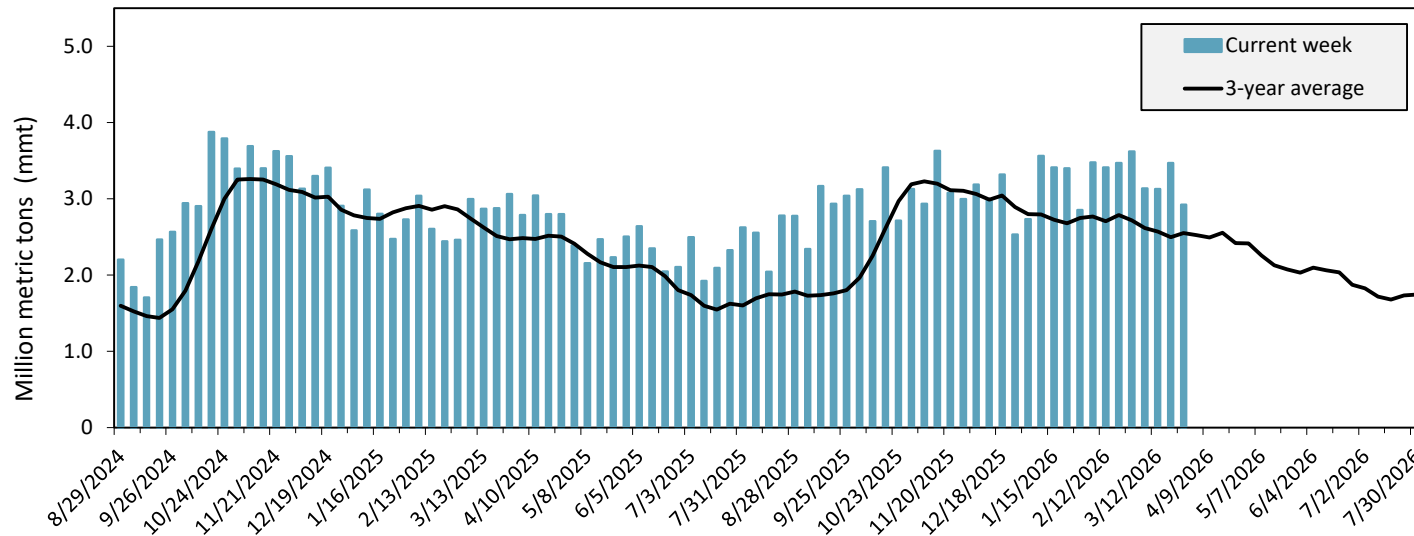
Port regions	Commodity	For the week ending 03/26/2026	Previous week*	Current week as % of previous	2026 YTD*	2025 YTD*	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	558	457	122	6,113	5,757	106	80	121	24,214
	Soybeans	135	268	50	2,705	1,657	163	187	335	2,957
	Wheat	166	124	134	2,439	2,453	99	86	93	12,271
	All grain	859	849	101	11,257	9,937	113	95	130	39,721
Mississippi Gulf	Corn	766	901	85	8,836	9,058	98	96	119	37,115
	Soybeans	304	641	47	8,208	7,306	112	89	96	23,350
	Wheat	56	159	35	753	813	93	80	66	3,980
	All grain	1,125	1,701	66	17,796	17,177	104	92	106	64,484
Texas Gulf	Corn	37	0	n/a	353	105	337	215	287	590
	Soybeans	13	0	n/a	100	106	94	63	190	1,431
	Wheat	90	100	91	1,097	691	159	115	202	4,690
	All grain	317	279	114	3,553	987	360	260	268	7,774
Interior	Corn	340	261	131	3,743	2,717	138	118	130	15,546
	Soybeans	130	141	92	1,724	1,579	109	114	110	7,712
	Wheat	52	77	68	700	686	102	114	123	3,104
	All grain	528	492	107	6,269	5,058	124	116	123	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	88	84	105	466	92	504	650	910	607
	Soybeans	5	5	99	238	412	58	116	21	1,085
	Wheat	0	0	n/a	0	0	n/a	n/a	0	81
	All grain	93	89	104	703	504	139	466	191	1,773
All Regions	Corn	1,790	1,703	105	19,510	17,729	110	97	127	78,486
	Soybeans	586	1,115	53	13,380	11,164	120	111	121	36,851
	Wheat	364	459	79	5,000	4,666	107	94	102	24,560
	All grain	2,922	3,470	84	39,996	33,789	118	106	124	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.

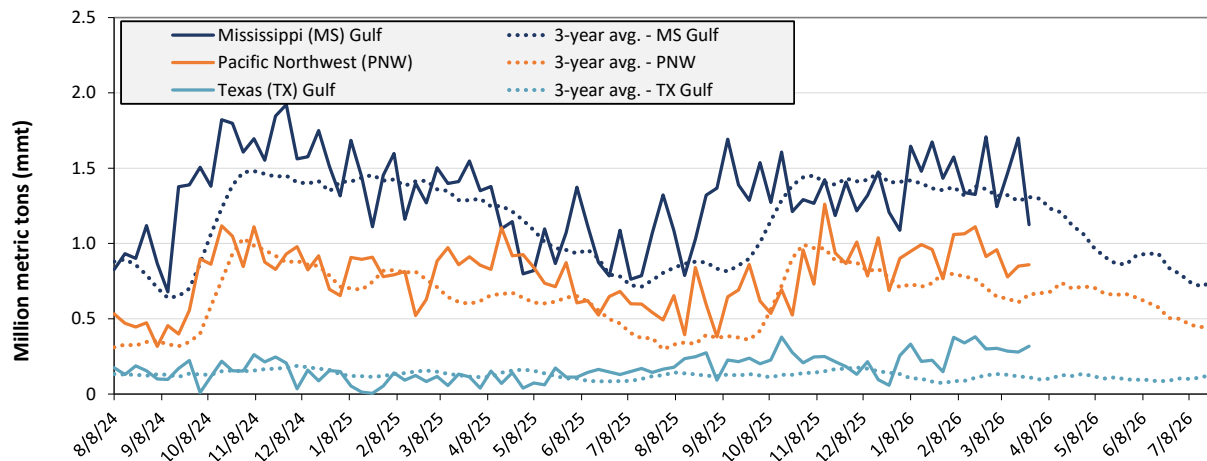
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending March 26: 2.9 mmt of grain inspected, down 16 percent from the previous week, down 11 percent from the same week last year, and up 15 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 03/26/26 inspections (mmt):

MS Gulf: 1.13

PNW: 0.86

TX Gulf: 0.32

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 34	up 14	down 27	up 1
Last year (same 7 days)	down 29	up 132	down 16	down 22
3-year average (4-week moving average)	down 14	up 187	up 2	up 30

Source: USDA, Federal Grain Inspection Service.

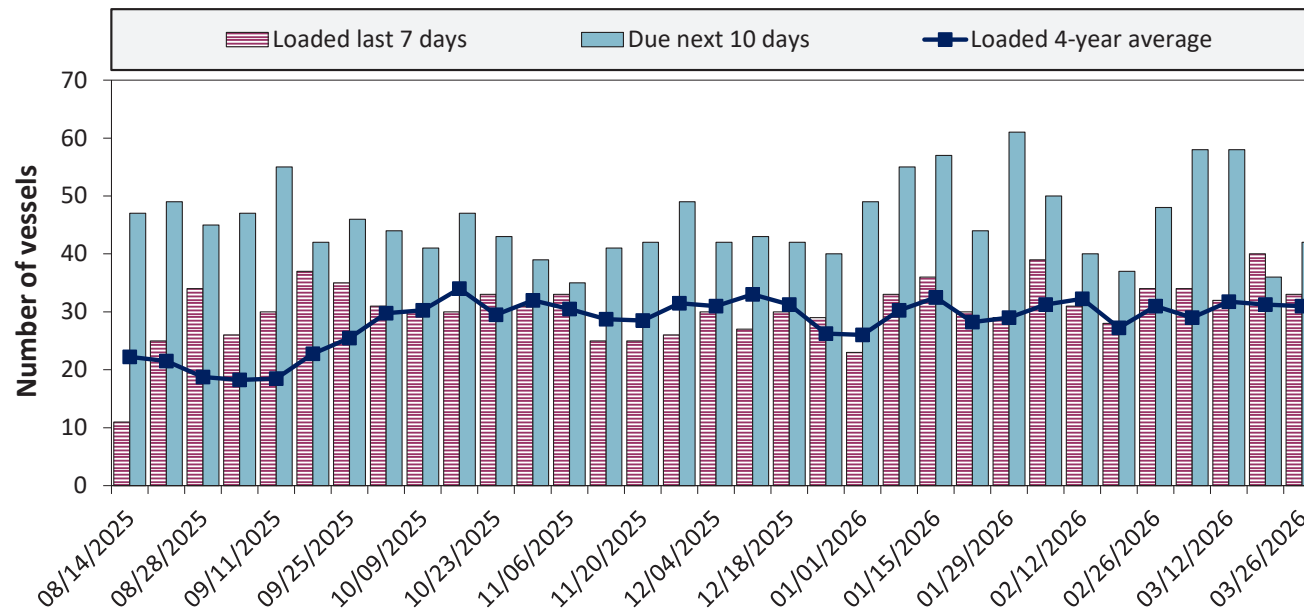
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
3/26/2026	39	33	42	14
3/19/2026	36	40	36	17
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

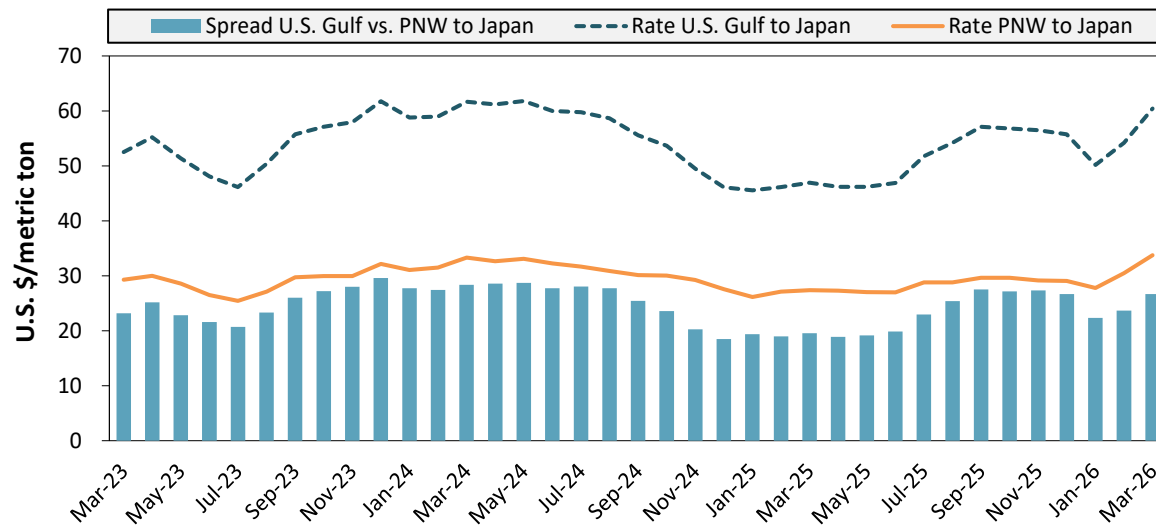


Week ending 03/26/26, number of vessels	Loaded	Due
Change from last year	3%	14%
Change from 4-year average	7%	7%

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 /World Perspectives, Inc.

Ocean rates	U.S. Gulf	PNW	Spread
March 2026	\$60.44	\$33.75	\$26.69
Change from March 2025	29%	23%	37%
Change from 4-year average	2%	2%	2%

Table 20. Ocean freight rates for selected shipments, week ending 03/28/2026

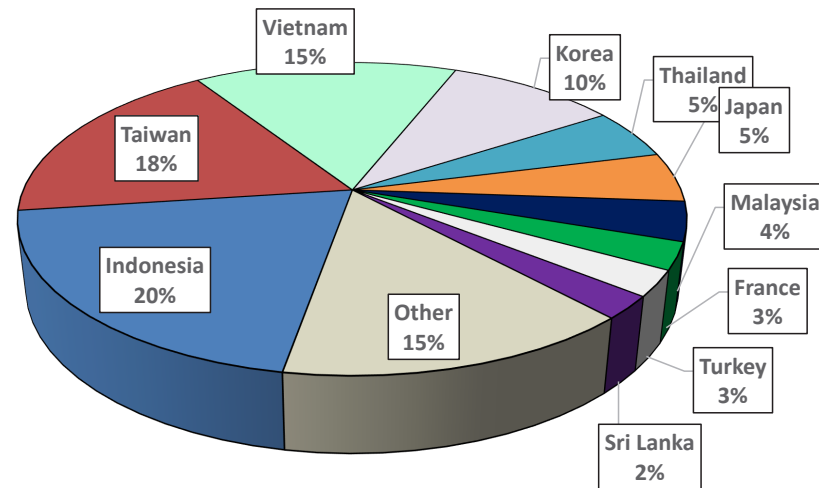
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Colombia	Soybean Meal	Mar 24, 2026	May 1/10, 2026	50,000	31.60
PNW	Bangladesh	Soybeans	Mar 11, 2026	May 1/10, 2026	48,400	57.31
PNW	S. Korea	Heavy grain	Mar 12, 2026	May 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	China	Heavy grain	Mar 27, 2026	Apr 23/30, 2026	63,000	49.50
Brazil	China	Heavy grain	Mar 27, 2026	Apr 15/24, 2026	66,000	49.00
Brazil	N. China	Heavy grain	Mar 25, 2026	Apr 6/15, 2026	66,000	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 23, 2026	Apr 15/24, 2026	66,000	53.00
Brazil	China	Heavy grain	Feb 11, 2026	Mar 9/30, 2026	66,000	40.75
Brazil	Indonesia	Soybeans	Mar 25, 2026	May 1/10, 2026	60,000	57.00
Brazil	S. Korea	Heavy grain	Feb 4, 2026	Apr 1/30, 2026	58,000	47.50
Brazil	Vietnam	Heavy grain	Mar 25, 2026	Apr 20/30, 2026	65,000	63.00

Note: 50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels. Rates shown are per metric ton (1 metric ton = 2,204.62 pounds), free on board (F.O.B.), except where otherwise indicated. op = option.

Source: Maritime Research, Inc.

In 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.

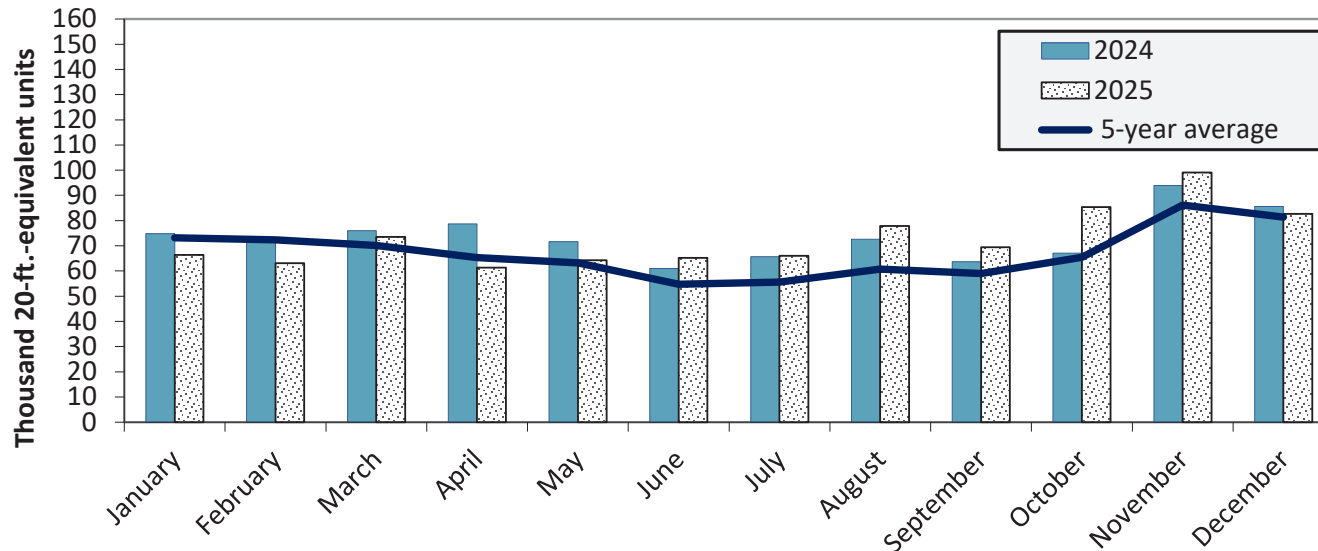
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Dec 2025



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

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