



# 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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[www.ams.usda.gov/GTR](http://www.ams.usda.gov/GTR)

**EPA Raises Renewable Fuel Volume Requirements for 2026 and 2027.** A [final rule](#) of the U.S. Environmental Protection Agency (EPA) has established the highest-ever renewable fuel standard (RFS) volume [requirements for 2026 and 2027](#). The RFS program requires transportation fuel sold in the United States to contain renewable fuels, with EPA setting annual volume requirements. The rule increases total renewable fuel obligations by more than 15 percent over 2023-25 levels.

In [public statements](#), USDA's Secretary and numerous agricultural groups praised the rule's expected contribution to farm income, soybean processing demand, and rural economic activity. EPA projects that biodiesel and renewable diesel production and use will need to exceed 2025 levels by more than 60 percent to meet the requirements.

Higher mandated volumes are likely to raise transportation demand for soybean oil, corn oil, and other biofuel feedstocks, as well as demand for the biodiesel and renewable diesel those inputs produce.

**Appeals Court Upholds FMC Rule on Carrier Refusals To Deal.** On March 31, the U.S. Court of Appeals for the District of Columbia Circuit court [denied](#) the World Shipping Council's (WSC's) challenge to a 2024 final rule of the Federal Maritime Commission (FMC) required by the Ocean Shipping Reform Act of 2022 ([Grain Transportation Report \(GTR\), July 25, 2024, first highlight](#)). The rule defines when an ocean carrier "unreasonably refuses to deal" or "negotiate for vessel space accommodations."

WSC had argued the rule unlawfully revived FMC's ratemaking authority that Congress had eliminated in the 1980s. The court disagreed, finding that FMC may consider extremely high price quotes as evidence of an "unreasonable refusal" (effectively, a denial of service). The decision affirms FMC's ability to assess whether rates or practices deter export bookings.

The court also upheld FMC's requirement that carriers document their export policy. The court found FMC has authority under U.S. shipping law to collect information about carrier pricing strategies and service practices, and that the requirement helps the agency evaluate whether a carrier's actions align with its stated policies.

**Virginia Rail Grant To Boost Poultry Feed Shipments.** On March 18, Virginia's Commonwealth Transportation Board [approved](#) a \$750,000 [Rail Industrial Access grant](#) to the Virginia Poultry Growers Cooperative (VPGC) to expand its [Grain Unloading Station](#) in Linville, VA. Part of a total \$1.5 million investment, [the project](#) will add 5,200 feet of track, as a new rail spur. The site is served by the Chesapeake Western Railway, which connects to Norfolk Southern Railway's main line in the Shenandoah Valley.

The Shenandoah Valley is home to significant poultry (especially turkey) populations. Like the [broader Southeast region](#), the Shenandoah Valley [depends](#) on grain delivered locally by truck and imported from the Midwest by rail. In 2023, the "Staunton, VA-WV" Bureau of Economic Analysis area (which includes the Linville facility) received 4,100 [carloads](#) of corn and soybean meal. Due for completion in 2027, the project could double

VPGC's annual rail use to 1,000 cars and enable diversification of its commodity mix to include carloads of soybean meal and propane.

**DOL Proposes New Independent Contractor Rule.** The U.S. Department of Labor (DOL) recently [proposed a rule](#) that addresses the issue of misclassifying truck drivers' employment status. In recent years, numerous lawsuits have accused motor carriers of hiring commercial drivers as independent contractors—despite treating them as employees—to undercut wages.

The newly proposed DOL rule [clarifies](#) under what conditions a worker is an employee or an independent contractor, under the Fair Labor Standards Act and related Federal laws. The proposed rule resembles a short-lived 2021 DOL rule that was largely seen as preserving the status quo for owner-operator truck drivers.

Unlike the 2021 rule, the 2026 rule [makes no reference to speed limiters](#), which the 2021 rule had cited as an example of a requirement motor carriers were allowed to impose for regulatory compliance. The Owner-Operator Independent Drivers Association applauded the proposed changes as "protecting independent contractors and rejecting any backdoor attempt to mandate dangerous speed limiter devices on truckers." Comments on the proposed rule can be [submitted](#) until April 28.

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 April 2, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2025/26 totaled 33.87 million metric tons (mmt), down 3 percent from last week and up 24 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26 were 1.36 mmt, up 18 percent from last week. Net [soybean export sales](#) were 0.30 mmt, down 16 percent from last week. Net [wheat export sales](#) were 0.164 mmt, up significantly from last week.

## Rail

U.S. Class I railroads originated 28,915 [grain carloads](#) during the week ending March 28. This was a 4-percent increase from the previous week, 5 percent more than last year, and 16 percent more than the 3-year average.

Average April [shuttle secondary railcar bids/offers](#) (per car) were \$567 above tariff for the week ending April 2. This was \$29 more than last week and \$511 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$97 above tariff. This was \$5 more than last week and \$3 lower than this week last year.

## Barge

For the week ending April 4, [barged grain movements](#) totaled 535,288 tons. This was 23 percent less than the previous week and 46 percent more than the same week last year.

For the week ending April 4, 332 [barges moved down river](#), 131 fewer than the previous week. There were 765 grain barges unloaded in the New Orleans region, 10 percent more than the previous week.

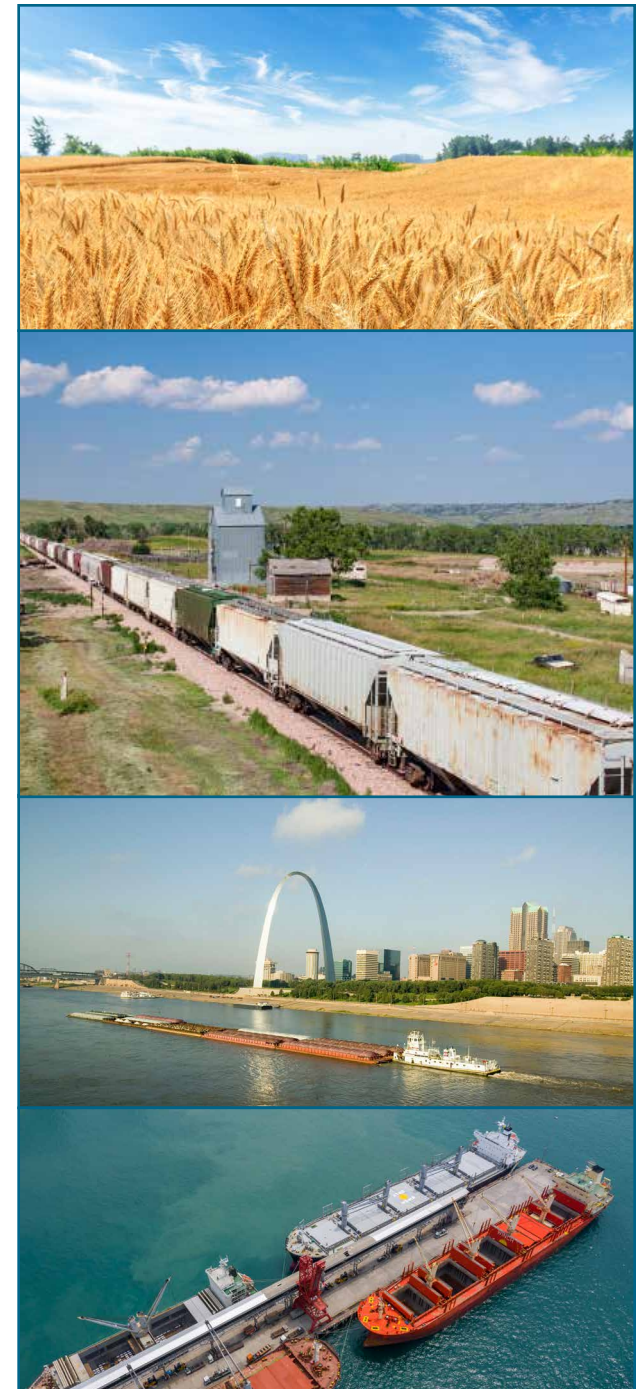
## Ocean

For the week ending April 2, 29 [oceangoing grain vessels](#) were loaded in the Gulf—4 percent more than the same period last year. Within the next 10 days (starting April 3), 41 vessels were expected to be loaded—3 percent more than the same period last year.

As of April 2, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$63.50, up 4 percent from the previous week. The rate from the Pacific Northwest to Japan was \$34.00 per mt, unchanged from the previous week.

## Fuel

For the week ending April 6, the [U.S. average diesel fuel price](#) increased 24.2 cents from the previous week to \$5.643 per gallon, 200.4 cents above the same week last year.



# Fertilizer Transportation Update

Given fertilizer's prominent role in grain production, farmers depend on efficient, reliable transportation to maintain affordable fertilizer prices. This article provides updates on available fertilizer supplies—as portrayed by fertilizer production and imports—and relays recent data on rail and barge movements of fertilizer. The piece also examines the current outlook for fertilizer transportation based on spring planting intentions, as well as shipping and production disruptions in the Middle East (a key origin for nitrogen fertilizers).

Additional charts, maps, and data are available on the [Fertilizer Transportation Dashboard](#) on AgTransport.

## Fertilizer Supplies—Production Stable and Imports Down in Second Half of 2025

From July to December 2025 (the first half of the 2026 fertilizer year), domestic production was unchanged from the prior 5-year average, while imports were down—especially for phosphate fertilizers.<sup>1</sup>

**Production.** According to [the Fertilizer Institute](#) (TFI)—on a nutrient-equivalent basis, the United States manufactured 7.4 million short tons (mst) of nitrogen from July

to December 2025—1 percent below average. Domestic phosphorus production over the same period was 3.2 mst—1 percent above average. North American (i.e., U.S. and Canadian) production of potassium was 8.5 mst—9 percent above average.<sup>2</sup>

U.S. nitrogen production is set to increase with the opening of Woodside Energy's [new ammonia plant in Beaumont, TX](#). The plant's ammonia production, which began in December, is expected to reach 1.2 mst annually.

**Imports.** According to U.S. Census Bureau trade data, the United States imported a total of 17.1 mst of [fertilizer commodities](#) from July to December 2025—7 percent below average. The top commodities (totaling 1 mst or more) were potash (6.7 mst); sulfuric acid (2.0 mst); phosphate rock (1.8 mst); urea (1.3 mst); anhydrous ammonia (1.1 mst); and urea ammonium nitrate (UAN) (1.0 mst).<sup>3</sup> Broken down by the top five countries of origin, imports were 5 percent above average from Canada; 14 percent above average from Russia; 11 percent above average from Peru; 19 percent below average from Trinidad and Tobago; and 91 percent below average from Saudi Arabia.

These same July to December 2025 fertilizer imports—converted to [nutrient-equivalent](#) values—were as follows: 2.1 mst of nitrogen, 10 percent below average; 0.3 mst of phosphorus, 57 percent below average; and 4.2 mst of potassium, 4 percent above average.

With regard to phosphate fertilizers, the United States imported above-average volumes of inputs (used in domestic production of phosphate fertilizers) and below-average volumes of finished products. From July to December 2025, U.S. imports of phosphate rock were 10 percent above average, and imports of sulfuric acid were 7 percent above average. (Both commodities are inputs to domestic phosphate fertilizer production.) Over the same period, U.S. imports of diammonium phosphate (DAP) and monoammonium phosphate (MAP), which are finished products, totaled just 0.2 mst—77 percent below average.

## Fertilizer Transportation—Rail Volumes Near Average While Barge Volumes Fall

Reflecting stable domestic production and imports from Canada, fertilizer carloads were near average in the second half of 2025. Upbound barged volumes on the Mississippi

<sup>1</sup> Unless otherwise noted, “average” refers to the prior 5-year average.

<sup>2</sup> Nutrient-equivalent tons reflect the nutrient content of a fertilizer commodity—either nitrogen (N), phosphorus (P2O5), or potassium (K2O). For example, urea is 46 percent nitrogen (N); DAP is 18 percent nitrogen (N) and 46 percent phosphorus (P2O5); and potash is 60 percent potassium (K2O).

<sup>3</sup> Each year, some portion of total U.S. potash imports from Canada are re-exported to other countries. Of the 6.7 mst of potash imported from July to December 2025, 2.1 mst was re-exported. The 4.6 mst of potash left for U.S. domestic use (after subtracting the re-exports) was 2 percent below average.

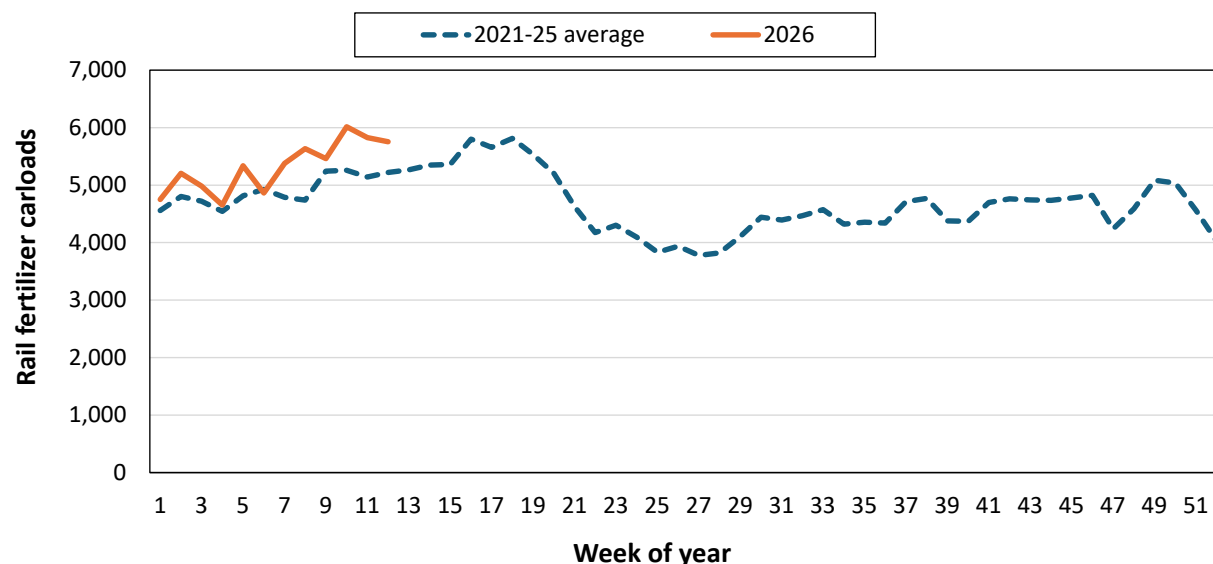
River System (MRS), however, were below average—reflecting lower volumes of fertilizer imports into New Orleans, LA.

**Rail.** According to weekly rail service [data from the Surface Transportation Board](#), U.S. Class I railroads originated 118,538 fertilizer carloads from July to December 2025—unchanged from average. Compared to each railroad’s respective average for the period, BNSF Railway (BNSF) was down 11 percent; Union Pacific Railroad (UP), up 7 percent; and CSX Transportation (CSX), up 2 percent. Over the same 6-month 2025 period, U.S. Class I railroads received 86,685 fertilizer carloads—3 percent above average.

Over the first 12 weeks of 2026, U.S. Class I railroads originated 63,862 fertilizer carloads—9 percent above average (fig. 1). Compared to each railroad’s respective average for the period, BNSF was up 27 percent; UP, up 16 percent; and CSX, down 3 percent. BNSF’s sharp rise in 2026 fertilizer carloads may reflect the firm’s new equipment reservation system for fertilizer trainsets ([Grain Transportation Report \(GTR\), December 11, 2025, third highlight](#)).

**Barge.** From July to December 2025, three locks at major confluences of the MRS gave passage to a total of 4.5 mst of northbound fertilizer (14 percent below average for the period). By lock, that total broke down as follows: Norrell Lock and Dam 1 on the Arkansas River (0.4 mst); Olmsted Locks and Dam on the Ohio River (1.3 mst); and Lock and

Figure 1. Rail fertilizer carloads originated by U.S. Class I railroads



Source: Surface Transportation Board.

Dam 27 on the Mississippi River (2.8 mst) ([GTR fig. 11](#)).<sup>4</sup> Declines in upbound fertilizer barge movements reflected lower fertilizer import volumes into the New Orleans customs district. Fertilizer imports into New Orleans totaled 3.4 mst from July to December 2025—down 29 percent from average.

By commodity, upbound barged volumes of nitrogen fertilizers (e.g., urea) and ammonia during the second half of 2025 were above average. The category that includes MAP and DAP was 53 percent below average, and potash was 25 percent below average.

Over the first 3 months of 2026, upbound barged fertilizer movements through the Arkansas River, Ohio River, and mid-

Mississippi River were 2.8 mst—4 percent below average. In recent weeks, the Mid and Upper Mississippi River segments reopened for navigation, allowing barges to convey fertilizer to the Minneapolis/St. Paul region ([GTR, March 26, 2026, second highlight](#)).

### Looking Ahead—Middle East Conflict Reduces Nitrogen Supplies Ahead of Spring Planting

Since the United States commenced military action against the Iranian regime on February 28, the conflict has reduced oil, gas, and fertilizer production in the Middle East. Additionally, attacks on commercial shipping

<sup>4</sup> Lock and Dam 27 (near St. Louis, MO) includes barge movements to the Upper Mississippi River and Illinois River. Barge movements on the Lower Mississippi River (i.e., below St. Louis, MO) do not pass through a lock.

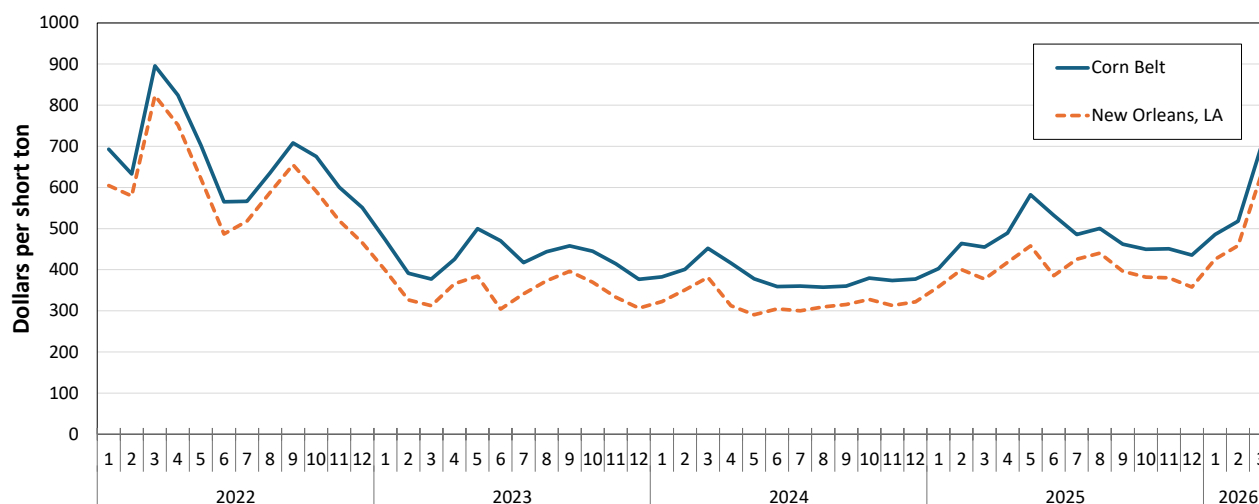
have largely [halted maritime traffic](#) through the Strait of Hormuz—a major passage for energy and fertilizer shipments that connects the Persian Gulf to the open ocean ([GTR, March 19, 2026, first highlight](#)).

Nitrogen fertilizers (particularly urea) are most impacted by the conflict. On average, over 40 percent of U.S. urea imports are sourced from Persian Gulf nations. In the first 2 months of 2026 (before the conflict began), U.S. imports of urea totaled 1.3 mst—32 percent above average. Over the same period, imports of UAN totaled 0.6 mst—52 percent above average. Above-average January-February imports may help to mitigate supply constraints from the conflict.

Already, rising fertilizer prices reflect reductions to supplies (fig. 2). From February to March, urea prices in New Orleans rose 37 percent (from \$458 to \$630 per ton). Urea prices in March are the highest since September 2022.

In response to rising fertilizer prices, the Federal Government has taken several actions. Last month, the United States withdrew sanctions on fertilizer imports from [Venezuela](#) and [Belarus](#). Also, in part to facilitate farmers' access to fertilizer, the U.S. President issued a

Figure 2. Average monthly urea prices in New Orleans, LA, and the Corn Belt



Source: Green Markets, a Bloomberg Company.

60-day suspension of the Jones Act—allowing foreign vessels to move domestic fertilizer cargoes ([GTR, March 19, 2026, second highlight](#)).

Despite rising prices for nitrogen fertilizers, farmers are still expected to plant above-average corn acres in 2026—as relayed by USDA's 2026 [Prospective Plantings](#) report. (Compared to other crops, corn requires more nitrogen fertilizer.) According to this year's

report, U.S. farmers intend to plant 95.3 million acres of corn—down 3 percent from 2025 corn plantings, but 2 percent above average. USDA will conduct another acreage survey in June, when crop acreages have been established or planting intentions are firm. These new estimates will be published in the [Acreage](#) report scheduled for release on June 30.

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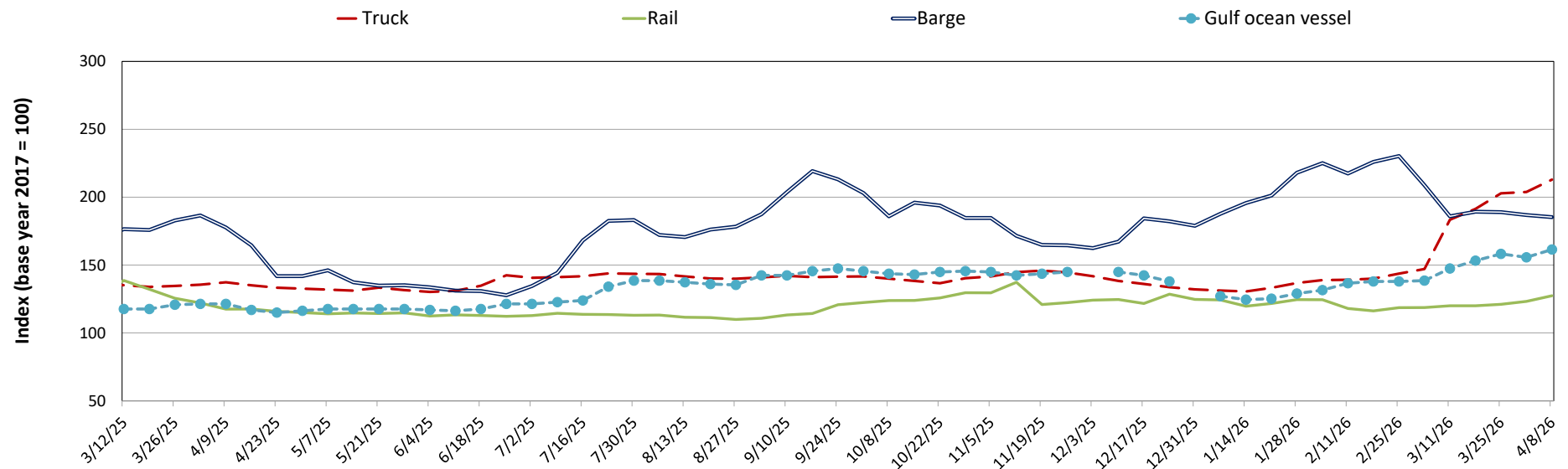
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

**Table 1. Grain transport cost indicators**

| For the week ending: | Truck | Rail | Barge | Ocean |         |
|----------------------|-------|------|-------|-------|---------|
|                      |       |      |       | Gulf  | Pacific |
| 04/08/26             | 213   | 127  | 185   | 161   | 162     |
| 04/01/26             | 204   | 123  | 187   | 156   | 162     |
| 04/09/25             | 137   | 118  | 178   | 121   | 135     |

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.

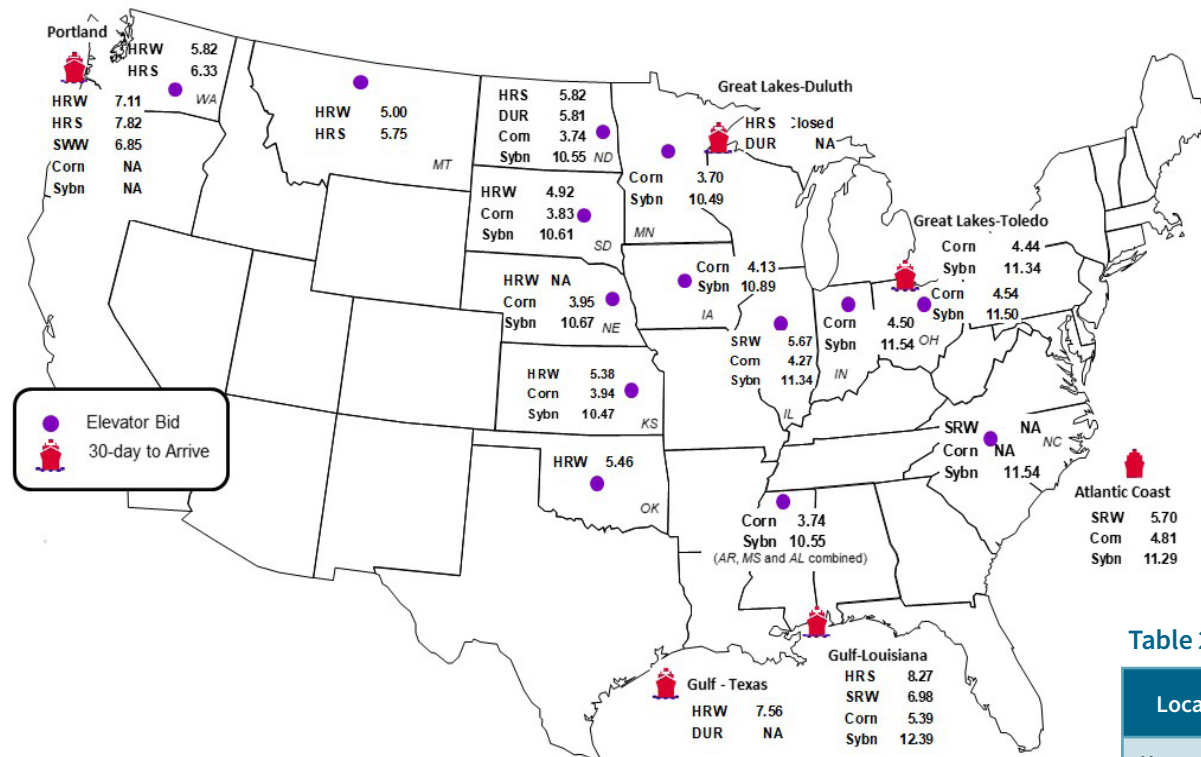
**Figure 1. Grain transportation cost indicators as of week ending 4/8/26**



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 | 4/2/2026 | 3/27/2026 |
|-----------|--------------------|----------|-----------|
| Corn      | IL-Gulf            | -1.12    | -1.13     |
| Corn      | NE-Gulf            | -1.44    | -1.45     |
| Soybean   | IA-Gulf            | -1.50    | -1.44     |
| HRW       | KS-Gulf            | -2.18    | -2.24     |
| HRS       | ND-Portland        | -2.00    | -1.98     |

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 | 4/2/2026 | Week ago<br>3/27/2026 | Year ago<br>4/4/2025 |
|-------------|---------|-------|----------|-----------------------|----------------------|
| Kansas City | Wheat   | May   | 6.156    | 6.326                 | 5.630                |
| Minneapolis | Wheat   | May   | 6.468    | 6.483                 | 5.844                |
| Chicago     | Wheat   | May   | 5.982    | 6.048                 | 5.366                |
| Chicago     | Corn    | May   | 4.522    | 4.620                 | 4.592                |
| Chicago     | Soybean | May   | 11.634   | 11.592                | 9.786                |

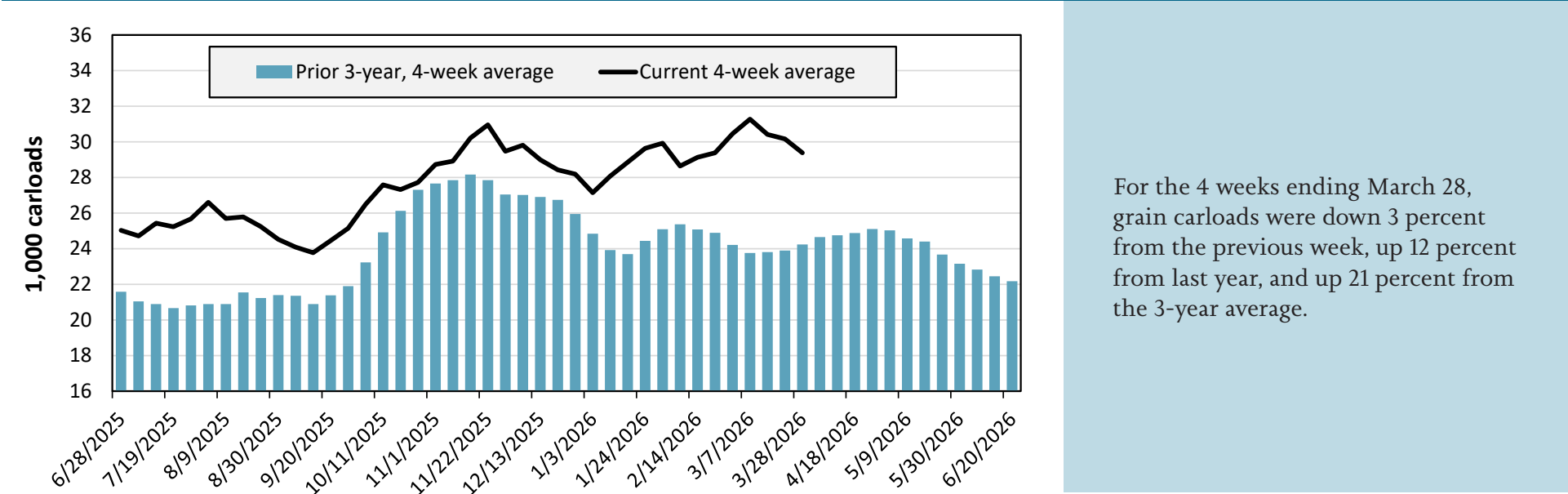
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

| For the week ending:<br>3/28/2026 | East   |         | West    |         | Central U.S. |        | U.S. total |
|-----------------------------------|--------|---------|---------|---------|--------------|--------|------------|
|                                   | CSX    | NS      | BNSF    | UP      | CPKC         | CN     |            |
| This week                         | 1,433  | 2,586   | 12,816  | 7,175   | 3,288        | 1,617  | 28,915     |
| This week last year               | 1,768  | 2,941   | 12,094  | 6,364   | 2,934        | 1,309  | 27,410     |
| 2026 YTD                          | 18,307 | 32,619  | 158,558 | 85,372  | 42,473       | 21,724 | 359,053    |
| 2025 YTD                          | 22,280 | 37,305  | 138,795 | 72,355  | 31,865       | 17,191 | 319,791    |
| 2026 YTD as % of 2025 YTD         | 82     | 87      | 114     | 118     | 133          | 126    | 112        |
| Last 4 weeks as % of 2025         | 90     | 95      | 112     | 120     | 112          | 133    | 112        |
| Last 4 weeks as % of 3-yr. avg.   | 86     | 103     | 127     | 123     | 125          | 147    | 121        |
| 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



Source: Surface Transportation Board.

**Table 4a. Rail service metrics—grain unit train origin dwell times and train speeds**

| For the week ending:<br>3/27/2026                   |                                   | East |      | West |      | Central U.S. |      | U.S. Average |
|-----------------------------------------------------|-----------------------------------|------|------|------|------|--------------|------|--------------|
|                                                     |                                   | CSX  | NS   | BNSF | UP   | CN           | CPKC |              |
| Average grain unit train origin dwell times (hours) | This week                         | 31.8 | 25.2 | 25.7 | 20.1 | 12.3         | 18.5 | 22.3         |
|                                                     | Average over last 4 weeks         | 37.5 | 27.5 | 23.6 | 18.9 | 13.6         | 18.9 | 23.3         |
|                                                     | Average of same 4 weeks last year | 30.0 | 29.5 | 26.7 | 18.7 | 9.3          | n/a  | 22.8         |
| Average grain unit train speeds (miles per hour)    | This week                         | 22.4 | 18.7 | 23.5 | 23.3 | 19.7         | 17.8 | 20.9         |
|                                                     | Average over last 4 weeks         | 22.4 | 18.1 | 24.1 | 23.2 | 22.0         | 18.7 | 21.4         |
|                                                     | Average of same 4 weeks last year | 21.9 | 19.4 | 24.2 | 21.1 | 23.7         | n/a  | 22.1         |

Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City; n/a = not available.

These service metrics are published weekly on the [Surface Transportation Board's website](#) and on [AgTransport](#). For more information on each service metric, see [49 CFR § 1250.2](#).

Source: Surface Transportation Board.

**Table 4b. Rail service metrics—unfilled grain car orders and delays**

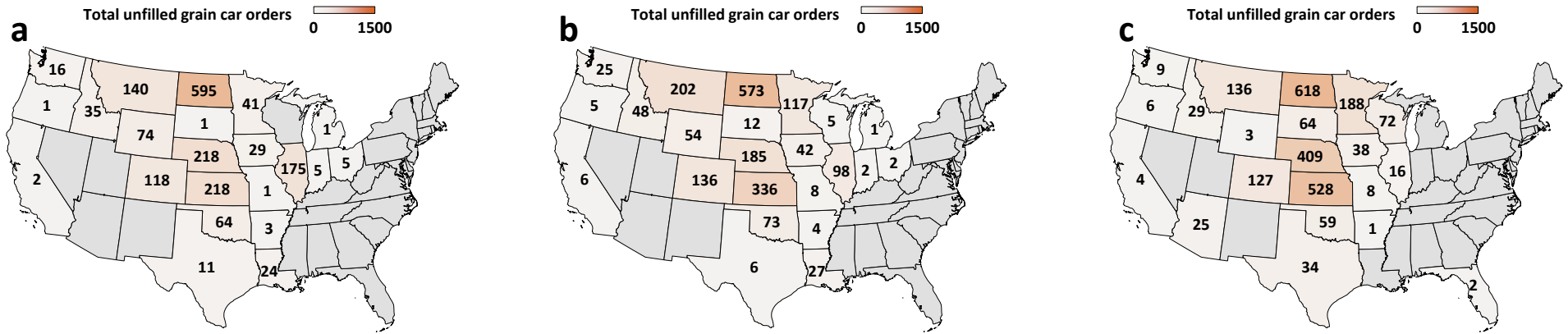
| For the week ending:<br>3/27/2026                              |                                   | East |     | West |       | Central U.S. |      | U.S. Total |
|----------------------------------------------------------------|-----------------------------------|------|-----|------|-------|--------------|------|------------|
|                                                                |                                   | CSX  | NS  | BNSF | UP    | CN           | CPKC |            |
| Average number of empty grain cars not moved in over 48 hours  | This week                         | 54   | 22  | 494  | 54    | 23           | 377  | 1,024      |
|                                                                | Average over last 4 weeks         | 39   | 11  | 404  | 59    | 11           | 266  | 788        |
|                                                                | Average of same 4 weeks last year | 66   | 8   | 367  | 98    | 8            | n/a  | 546        |
| Average number of loaded grain cars not moved in over 48 hours | This week                         | 64   | 99  | 429  | 58    | 19           | 309  | 978        |
|                                                                | Average over last 4 weeks         | 60   | 157 | 519  | 55    | 18           | 327  | 1,136      |
|                                                                | Average of same 4 weeks last year | 119  | 155 | 500  | 90    | 5            | n/a  | 868        |
| Average number of grain unit trains held                       | This week                         | 0    | 1   | 6    | 4     | 1            | 5    | 17         |
|                                                                | Average over last 4 weeks         | 0    | 0   | 6    | 4     | 1            | 5    | 16         |
|                                                                | Average of same 4 weeks last year | 1    | 0   | 21   | 9     | 1            | n/a  | 31         |
| Total unfilled manifest grain car orders                       | This week                         | 24   | 14  | 907  | 510   | 0            | 322  | 1,777      |
|                                                                | Average over last 4 weeks         | 10   | 16  | 901  | 780   | 0            | 285  | 1,991      |
|                                                                | Average of same 4 weeks last year | 3    | 5   | 592  | 1,170 | 0            | n/a  | 1,768      |

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](#).

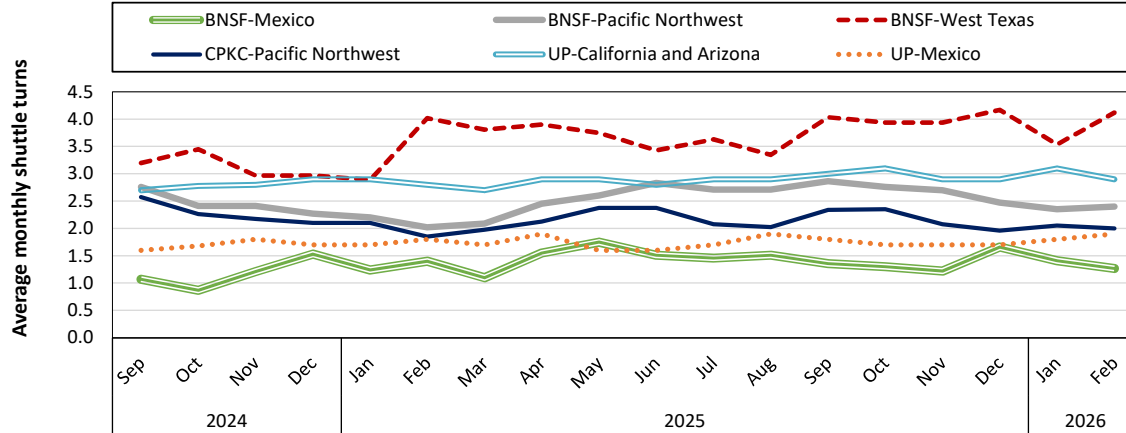
Source: Surface Transportation Board.

**Figure 4. Unfilled manifest grain car orders by State for the week ending 3/27/2026 (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**

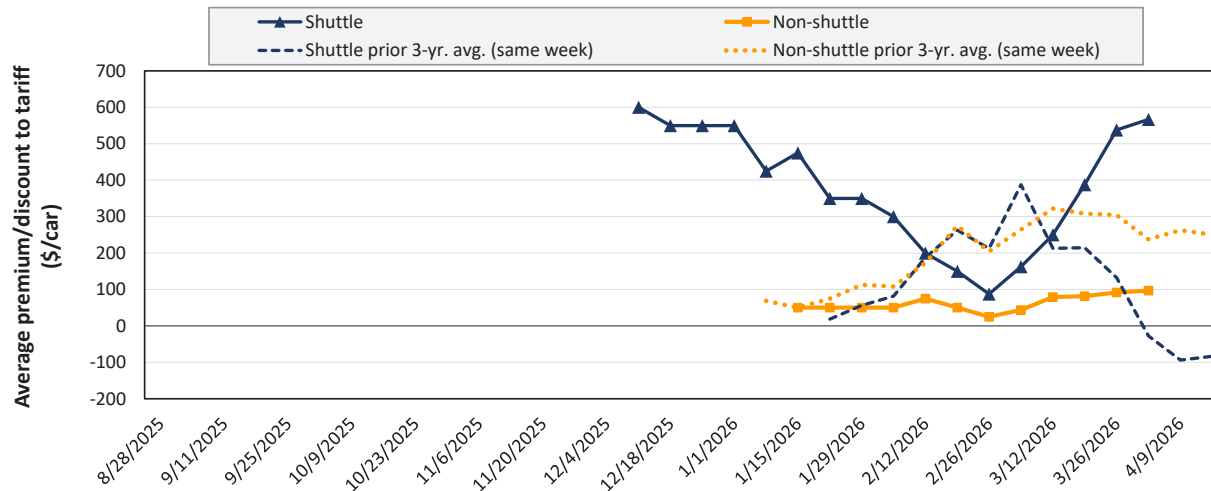


In February 2026, BNSF Railway's average monthly grain shuttle turns were 1.3 to Mexico, 2.4 to the Pacific Northwest, and 4.1 to West Texas. CPKC's shuttle turns averaged 2 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.9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



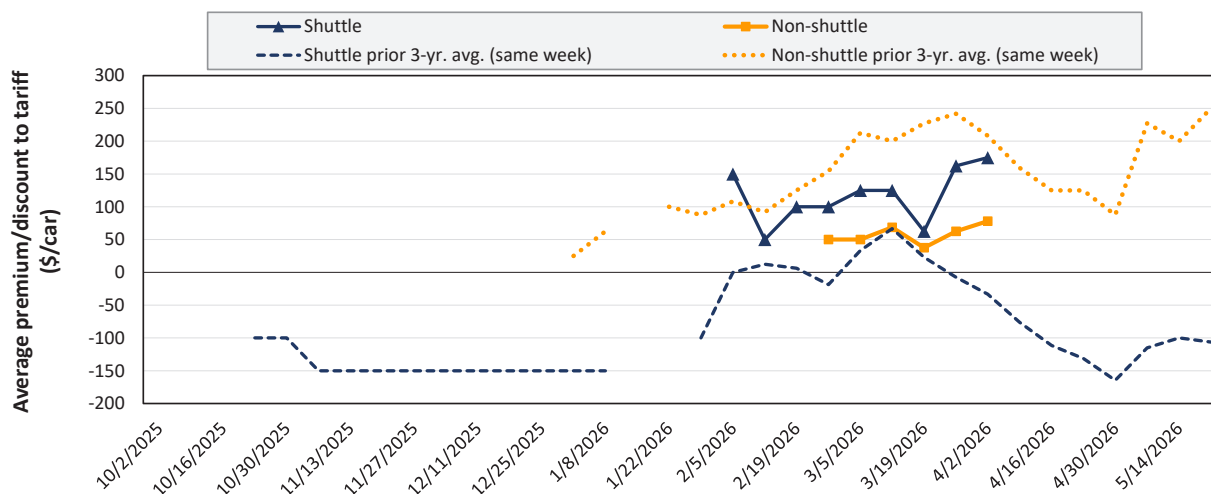
Average non-shuttle bids/offers rose \$5 this week, and are at the peak.

Average shuttle bids/offers rose \$29 this week and are \$33 below the peak.

| 4/2/2026    | BNSF  | UP    |
|-------------|-------|-------|
| Non-Shuttle | \$44  | \$150 |
| Shuttle     | \$775 | \$358 |

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**



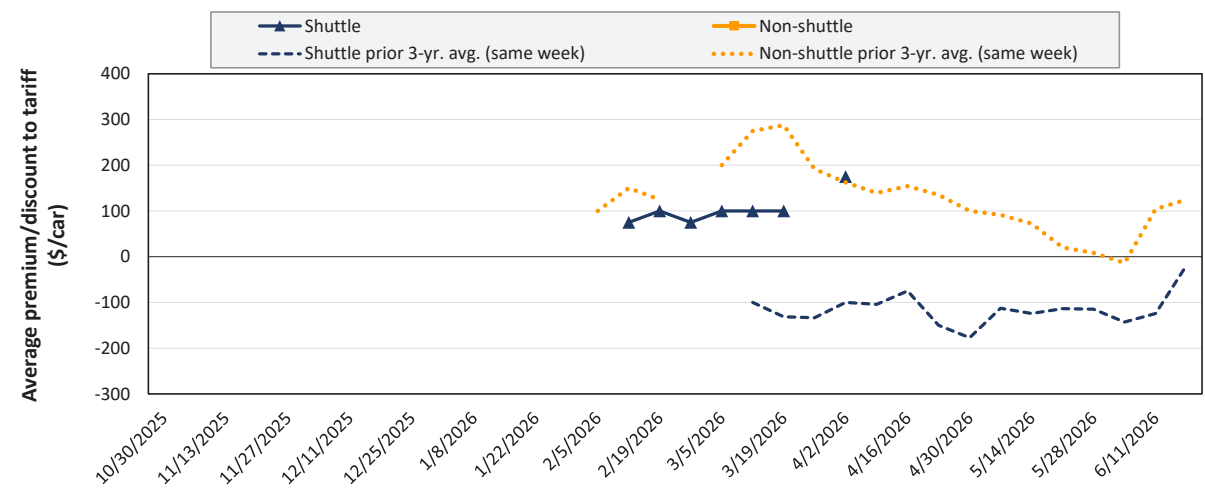
Average non-shuttle bids/offers rose \$16 this week, and are at the peak.

Average shuttle bids/offers rose \$13 this week and are at the peak.

| 4/2/2026    | BNSF  | UP    |
|-------------|-------|-------|
| Non-Shuttle | \$38  | \$119 |
| Shuttle     | \$250 | \$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 last week. Average shuttle bids/offers this week are at the peak.

| 4/2/2026    | BNSF  | UP  |
|-------------|-------|-----|
| Non-Shuttle | n/a   | n/a |
| Shuttle     | \$175 | 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:<br>4/2/2026 |                            | Delivery period |        |        |        |        |        |
|----------------------------------|----------------------------|-----------------|--------|--------|--------|--------|--------|
|                                  |                            | Apr-26          | May-26 | Jun-26 | Jul-26 | Aug-26 | Sep-26 |
| Non-shuttle                      | BNSF                       | 44              | 38     | n/a    | n/a    | n/a    | n/a    |
|                                  | Change from last week      | 11              | 13     | n/a    | n/a    | n/a    | n/a    |
|                                  | Change from same week 2025 | -69             | -75    | n/a    | n/a    | n/a    | n/a    |
|                                  | UP                         | 150             | 119    | n/a    | n/a    | n/a    | n/a    |
|                                  | Change from last week      | 0               | 19     | n/a    | n/a    | n/a    | n/a    |
|                                  | Change from same week 2025 | 63              | 31     | n/a    | n/a    | n/a    | n/a    |
| Shuttle                          | BNSF                       | 775             | 250    | 175    | 25     | n/a    | n/a    |
|                                  | Change from last week      | 75              | 25     | n/a    | 25     | n/a    | n/a    |
|                                  | Change from same week 2025 | 638             | 163    | 175    | n/a    | n/a    | n/a    |
|                                  | UP                         | 358             | 100    | n/a    | n/a    | n/a    | n/a    |
|                                  | Change from last week      | -17             | 0      | n/a    | n/a    | n/a    | n/a    |
|                                  | Change from same week 2025 | 385             | 100    | n/a    | n/a    | n/a    | n/a    |
|                                  | CPKC                       | 225             | 100    | -50    | n/a    | n/a    | n/a    |
|                                  | Change from last week      | 112             | 0      | n/a    | n/a    | n/a    | n/a    |
|                                  | Change from same week 2025 | 325             | -100   | 25     | 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<br>(To East Coast<br>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), IL | 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](#).

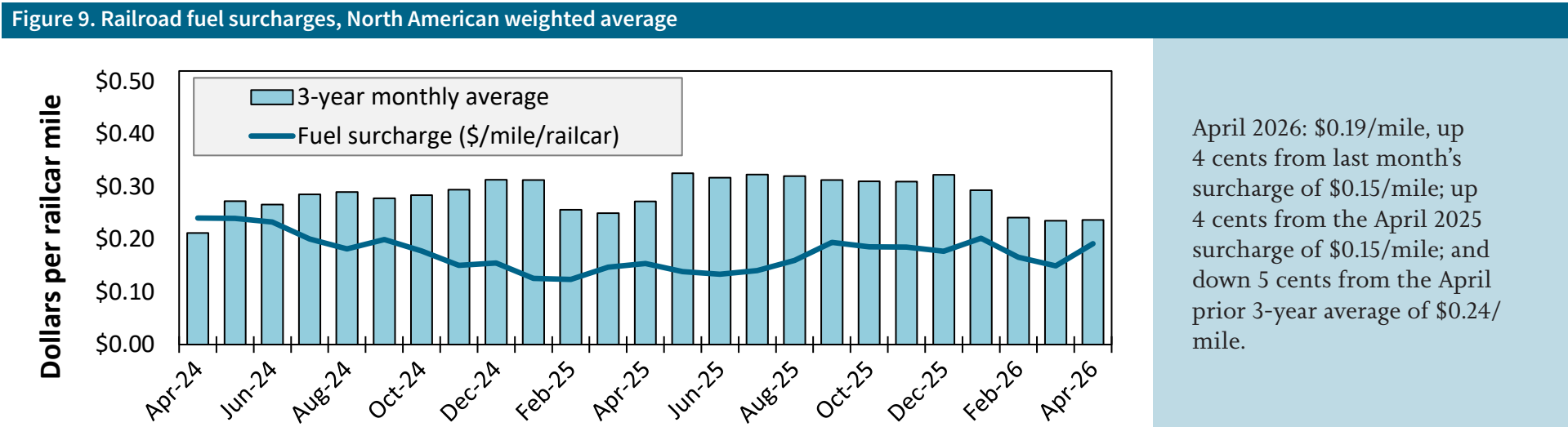
Source: BNSF Railway, Canadian National Railway, CPKC, CSX Transportation, and Union Pacific Railroad.

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

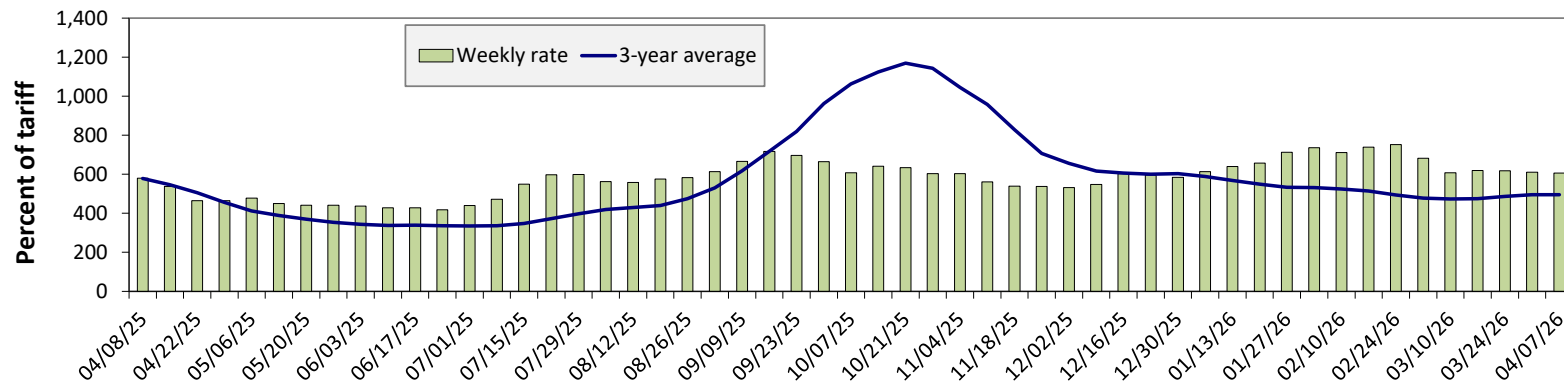
| Commodity | US origin          | US border city | US railroad | Train type  | US Tariff Rate per car (USD) | US Fuel Surcharge per car (USD) | US Rate Plus Fuel Surcharge per car (USD) | US Tariff Rate + Fuel Surcharge per bushel (USD) | US Tariff Rate + Fuel Surcharge per metric ton (USD) | Percent 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).



**Figure 10. Illinois River barge freight rate**



For the week ending April 7: 1 percent lower than the previous week; 4 percent higher than last year; and 22 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                                     | 4/7/2026    | 713         | 649             | 606            | 457       | 508        | 372           |
|                                          | 3/31/2026   | 710         | 673             | 611            | 453       | 496        | 383           |
| \$/ton                                   | 4/7/2026    | 44.13       | 34.53           | 28.12          | 18.23     | 23.83      | 11.68         |
|                                          | 3/31/2026   | 43.95       | 35.80           | 28.35          | 18.07     | 23.26      | 12.03         |
| Measure                                  | Time Period | Twin Cities | Mid-Mississippi | Illinois River | St. Louis | Ohio River | Cairo-Memphis |
| Current week % change from the same week | Last year   | 17          | 6               | 4              | 13        | 29         | 7             |
|                                          | 3-year avg. | 37          | 29              | 22             | 25        | 33         | 21            |
| Rate                                     | May         | 669         | 608             | 571            | 436       | 471        | 359           |
|                                          | July        | 624         | 571             | 519            | 418       | 446        | 352           |

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](#).

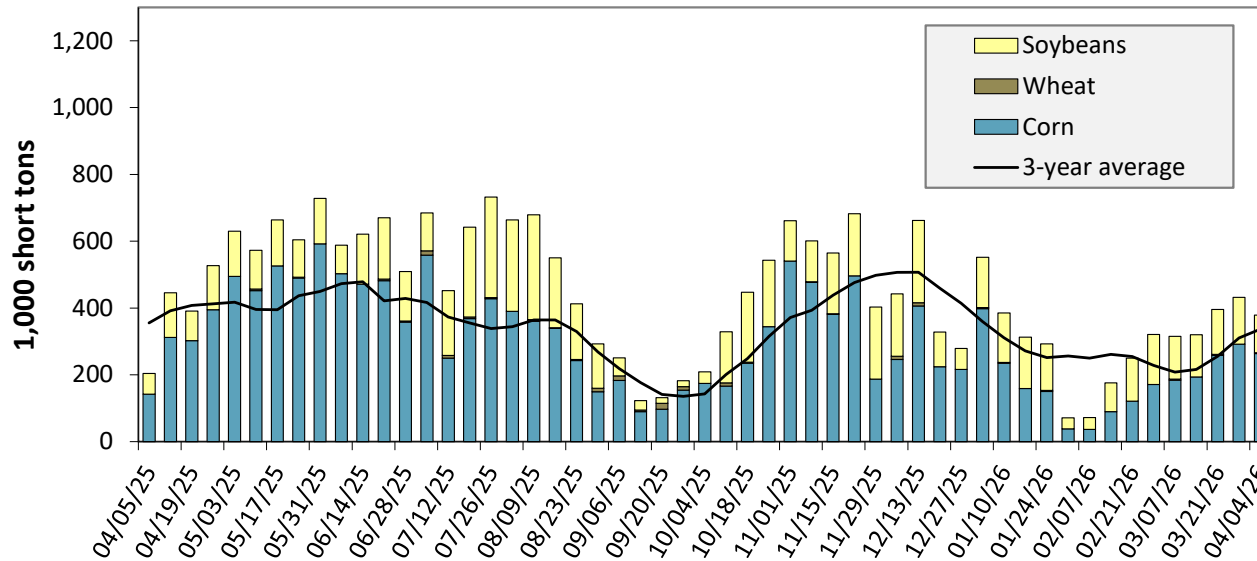
Source: USDA, Agricultural Marketing Service.

**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 April 4: 86 percent higher than last year and 12 percent higher than the 3-year average.

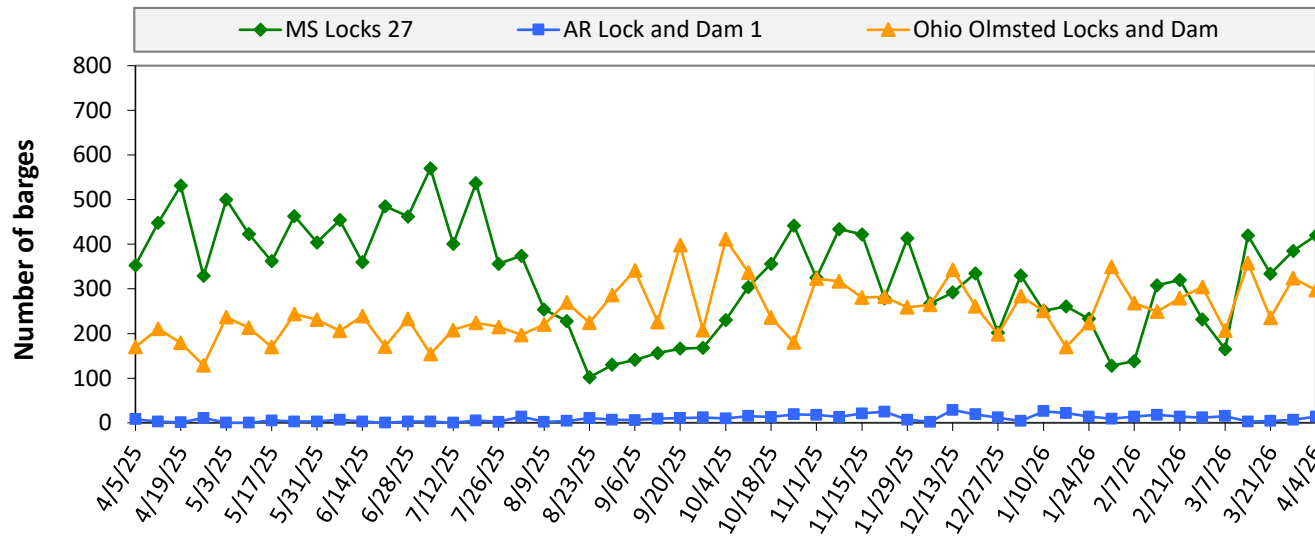
Note: The 3-year average is a 4-week moving average.  
Source: U.S. Army Corps of Engineers.

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

| For the week ending 04/04/2026             | Corn   | Wheat | Soybeans | Other | Total  |
|--------------------------------------------|--------|-------|----------|-------|--------|
| Mississippi River (Rock Island, IL (L15))  | 42     | 0     | 23       | 0     | 65     |
| Mississippi River (Winfield, MO (L25))     | 135    | 2     | 62       | 0     | 199    |
| Mississippi River (Alton, IL (L26))        | 257    | 2     | 94       | 0     | 353    |
| Mississippi River (Granite City, IL (L27)) | 264    | 2     | 113      | 0     | 378    |
| Illinois River (La Grange)                 | 110    | 0     | 37       | 0     | 146    |
| Ohio River (Olmsted)                       | 102    | 6     | 32       | 0     | 140    |
| Arkansas River (L1)                        | 0      | 14    | 3        | 0     | 17     |
| Weekly total - 2026                        | 365    | 22    | 148      | 0     | 535    |
| Weekly total - 2025                        | 221    | 17    | 126      | 4     | 367    |
| 2026 YTD                                   | 3,530  | 232   | 2,698    | 28    | 6,487  |
| 2025 YTD                                   | 4,287  | 265   | 3,196    | 75    | 7,823  |
| 2026 as % of 2025 YTD                      | 82     | 87    | 84       | 37    | 83     |
| Last 4 weeks as % of 2025                  | 97     | 96    | 96       | 3     | 94     |
| 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.

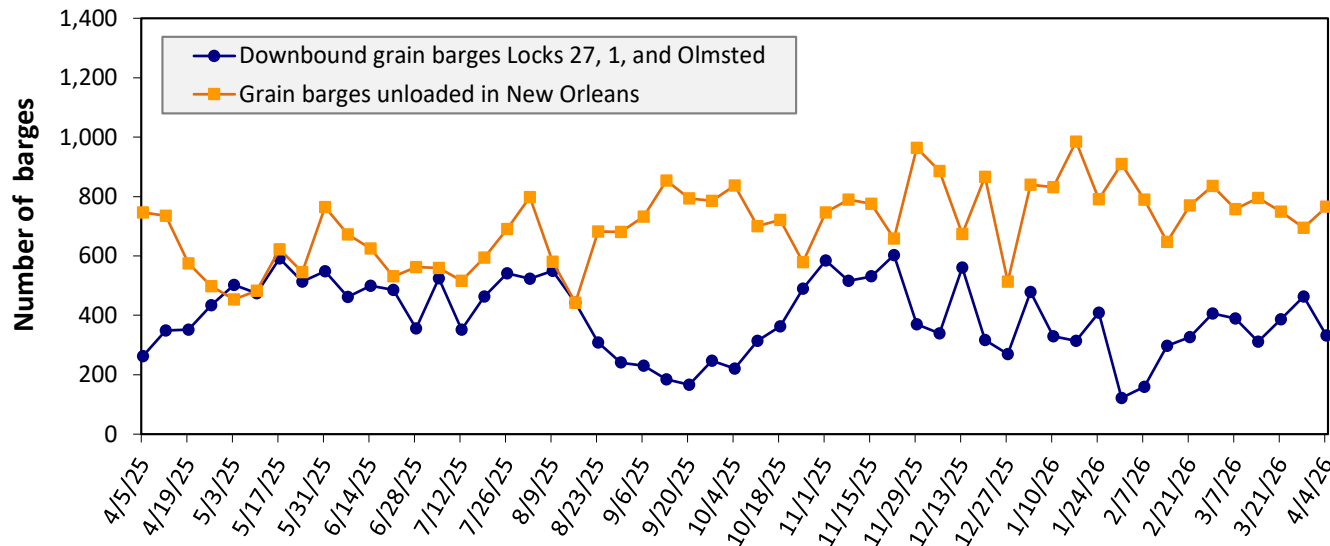
**Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam**



For the week ending April 4: 731 barges transited the locks, 15 barges more than the previous week, and 5 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 April 4: 332 barges moved down river, 131 fewer than the previous week; 765 grain barges unloaded in the New Orleans Region, 10 percent more than the previous week.

Note: Olmsted = Olmsted Locks and Dam.

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

**Table 11. Monthly barge freight rates, Columbia-Snake River**

| River          | Origin                               | \$/ton     |            |            | Current month % change from the same month |             |
|----------------|--------------------------------------|------------|------------|------------|--------------------------------------------|-------------|
|                |                                      | 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.

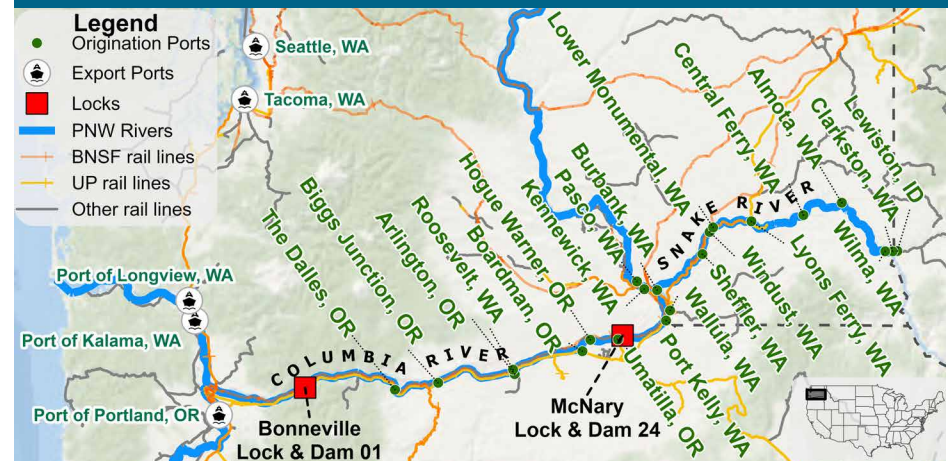
**Table 12. Monthly barged grain movements, Columbia-Snake (1,000 tons)**

| 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.

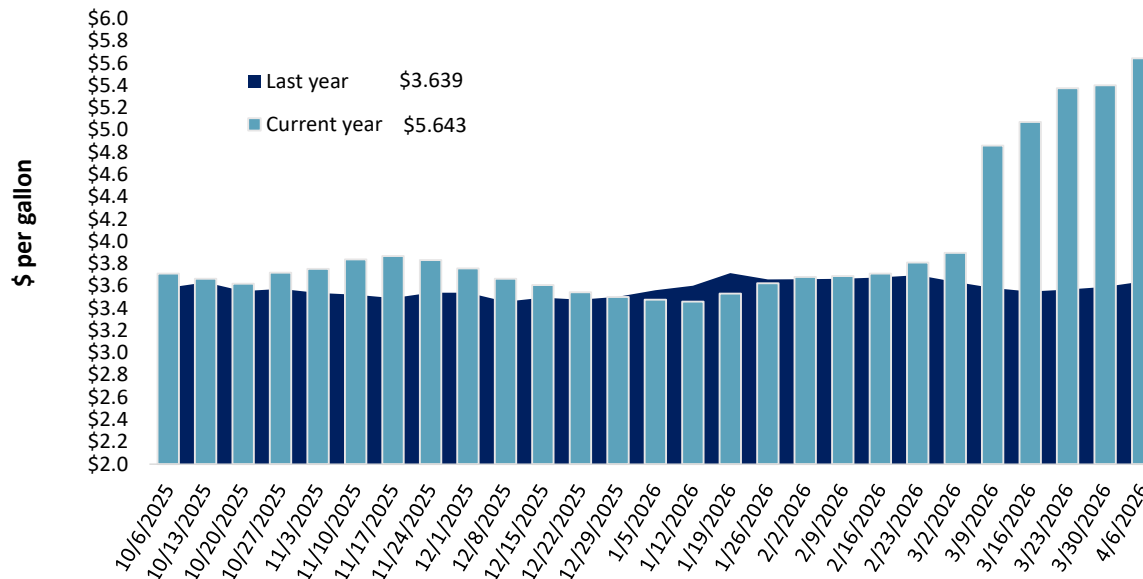
**Table 13. Retail on-highway diesel prices, week ending 4/6/2026 (U.S. \$/gallon)**

| Region | Location                   | Price | Change from |          |
|--------|----------------------------|-------|-------------|----------|
|        |                            |       | Week ago    | Year ago |
| I      | East Coast                 | 5.740 | 0.205       | 2.027    |
|        | New England                | 5.997 | 0.172       | 1.991    |
|        | Central Atlantic           | 5.980 | 0.146       | 2.097    |
|        | Lower Atlantic             | 5.624 | 0.230       | 2.004    |
| II     | Midwest                    | 5.304 | 0.199       | 1.725    |
| III    | Gulf Coast                 | 5.415 | 0.310       | 2.077    |
| IV     | Rocky Mountain             | 5.412 | 0.142       | 1.913    |
| V      | West Coast                 | 6.924 | 0.328       | 2.606    |
|        | West Coast less California | 6.336 | 0.280       | 2.460    |
|        | California                 | 7.567 | 0.348       | 2.740    |
| Total  | United States              | 5.643 | 0.242       | 2.004    |

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 April 6, the U.S. average diesel fuel price increased 24.2 cents from the previous week to \$5.643 per gallon, 200.4 cents above the same week last year.

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 4/2/2026            | 1,194                 | 520                   | 1,227                 | 989                    | 121   | 4,051     | 22,425 | 7,389    | 33,865  |
|                                              | This week year ago                      | 1,262                 | 490                   | 1,220                 | 1,179                  | 84    | 4,236     | 18,495 | 4,679    | 27,410  |
|                                              | Last 4 wks. as % of same period 2024/25 | 103                   | 128                   | 106                   | 86                     | 157   | 103       | 126    | 170      | 130     |
| Current shipped (cumulative) exports sales   | 2025/26 YTD                             | 7,413                 | 2,782                 | 5,127                 | 4,415                  | 485   | 20,223    | 48,962 | 30,516   | 99,700  |
|                                              | 2024/25YTD                              | 4,083                 | 2,648                 | 5,520                 | 4,577                  | 272   | 17,100    | 36,525 | 41,474   | 95,099  |
|                                              | YTD 2025/26 as % of 2024/25             | 182                   | 105                   | 93                    | 96                     | 178   | 118       | 134    | 74       | 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 4/2/2026                     | 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                                           | 21,206                       | 19,282         | 10                               | 19,839                                    |
| Japan                                            | 12,107                       | 9,199          | 32                               | 10,478                                    |
| Colombia                                         | 5,967                        | 5,637          | 6                                | 5,493                                     |
| China                                            | 0                            | 33             | -100                             | 3,461                                     |
| Korea                                            | 6,872                        | 4,043          | 70                               | 3,127                                     |
| Top 5 importers                                  | 39,280                       | 34,151         | 15                               | 39,272                                    |
| Total U.S. corn export sales                     | 71,386                       | 54,660         | 31                               | 54,276                                    |
| % of YTD current month's export projection       | 85%                          | 75%            | -                                | -                                         |
| Change from prior week                           | 1,361                        | 2,390          | -                                | -                                         |
| Top 5 importers' share of U.S. corn export sales | 55%                          | 62%            | -                                | 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 4/2/2026                        | 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                                               | 11,508                       | 22,264         | -48                              | 26,078                                    |
| Mexico                                              | 4,615                        | 4,215          | 10                               | 4,762                                     |
| Japan                                               | 1,806                        | 1,672          | 8                                | 2,107                                     |
| Egypt                                               | 4,273                        | 2,650          | 61                               | 2,098                                     |
| Indonesia                                           | 1,811                        | 1,424          | 27                               | 1,997                                     |
| Top 5 importers                                     | 24,014                       | 32,225         | -25                              | 37,042                                    |
| Total U.S. soybean export sales                     | 37,905                       | 45,787         | -17                              | 48,941                                    |
| % of YTD current month's export projection          | 88%                          | 89%            | -                                | -                                         |
| Change from prior week                              | 295                          | 172            | -                                | -                                         |
| Top 5 importers' share of U.S. soybean export sales | 63%                          | 70%            | -                                | 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 4/2/2026                       | 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                                             | 4,456                        | 3,971          | 12                               | 3,358                                     |
| Philippines                                        | 2,930                        | 2,597          | 13                               | 2,473                                     |
| Japan                                              | 2,153                        | 2,108          | 2                                | 2,045                                     |
| China                                              | 336                          | 139            | 142                              | 1,137                                     |
| Korea                                              | 1,877                        | 2,373          | -21                              | 1,674                                     |
| Taiwan                                             | 975                          | 1,010          | -3                               | 935                                       |
| Thailand                                           | 657                          | 887            | -26                              | 667                                       |
| Nigeria                                            | 1,459                        | 713            | 105                              | 629                                       |
| Indonesia                                          | 1,087                        | 754            | 44                               | 518                                       |
| Colombia                                           | 703                          | 451            | 56                               | 489                                       |
| Top 10 importers                                   | 16,632                       | 15,003         | 11                               | 13,926                                    |
| Total U.S. wheat export sales                      | 24,274                       | 21,205         | 14                               | 19,135                                    |
| % of YTD current month's export projection         | 99%                          | 94%            | -                                | -                                         |
| Change from prior week                             | 164                          | 107            | -                                | -                                         |
| Top 10 importers' share of U.S. wheat export sales | 69%                          | 71%            | -                                | 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)

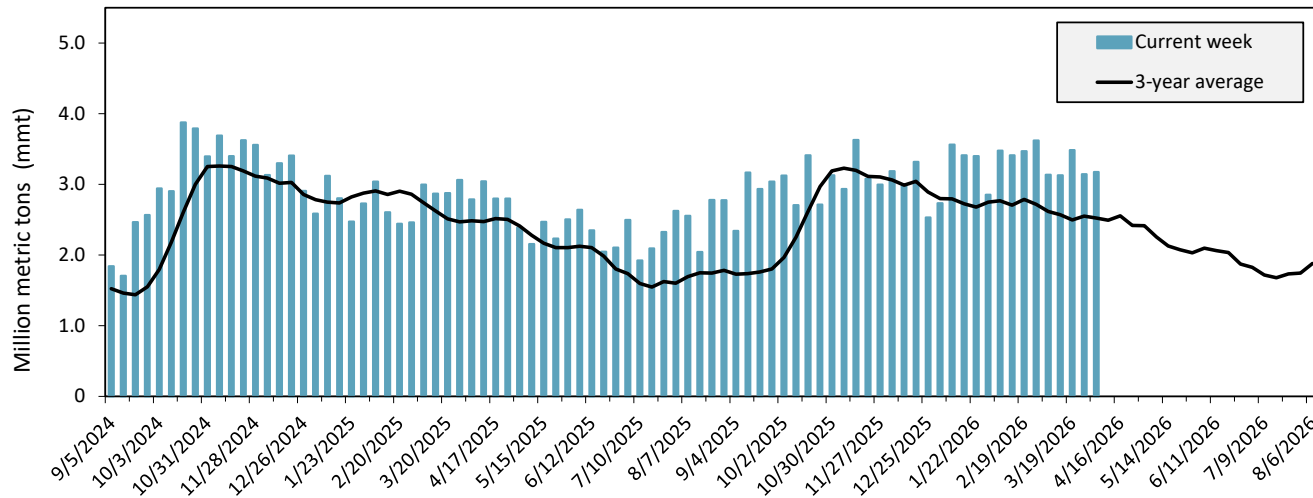
| Port regions      | Commodity | For the week ending<br>04/02/2026 | Previous<br>week* | Current week<br>as % of previous | 2026 YTD* | 2025 YTD* | 2026 YTD as<br>% of 2025 YTD | Last 4-weeks as % of: |                  | 2025 total* |
|-------------------|-----------|-----------------------------------|-------------------|----------------------------------|-----------|-----------|------------------------------|-----------------------|------------------|-------------|
|                   |           |                                   |                   |                                  |           |           |                              | Last year             | Prior 3-yr. avg. |             |
| Pacific Northwest | Corn      | 485                               | 590               | 82                               | 6,630     | 6,328     | 105                          | 82                    | 122              | 24,214      |
|                   | Soybeans  | 270                               | 135               | 201                              | 2,976     | 1,724     | 173                          | 233                   | 424              | 2,957       |
|                   | Wheat     | 113                               | 166               | 68                               | 2,552     | 2,602     | 98                           | 57                    | 69               | 12,271      |
|                   | All grain | 868                               | 891               | 97                               | 12,158    | 10,744    | 113                          | 92                    | 126              | 39,721      |
| Mississippi Gulf  | Corn      | 1,078                             | 822               | 131                              | 9,970     | 9,667     | 103                          | 119                   | 138              | 37,115      |
|                   | Soybeans  | 235                               | 393               | 60                               | 8,532     | 7,851     | 109                          | 82                    | 87               | 23,350      |
|                   | Wheat     | 62                                | 66                | 94                               | 841       | 926       | 91                           | 85                    | 77               | 3,980       |
|                   | All grain | 1,376                             | 1,281             | 107                              | 19,343    | 18,444    | 105                          | 103                   | 113              | 64,484      |
| Texas Gulf        | Corn      | 22                                | 37                | 59                               | 375       | 105       | 358                          | 205                   | 276              | 590         |
|                   | Soybeans  | 0                                 | 13                | 0                                | 100       | 106       | 94                           | 63                    | 190              | 1,431       |
|                   | Wheat     | 109                               | 90                | 120                              | 1,205     | 731       | 165                          | 138                   | 218              | 4,690       |
|                   | All grain | 188                               | 317               | 59                               | 3,742     | 1,027     | 364                          | 284                   | 274              | 7,774       |
| Interior          | Corn      | 394                               | 343               | 115                              | 4,140     | 3,071     | 135                          | 116                   | 134              | 15,546      |
|                   | Soybeans  | 171                               | 149               | 115                              | 1,913     | 1,742     | 110                          | 113                   | 118              | 7,712       |
|                   | Wheat     | 50                                | 52                | 97                               | 751       | 709       | 106                          | 115                   | 125              | 3,104       |
|                   | All grain | 617                               | 549               | 112                              | 6,908     | 5,599     | 123                          | 114                   | 127              | 26,887      |
| Great Lakes       | Corn      | 23                                | 0                 | n/a                              | 23        | 0         | n/a                          | n/a                   | n/a              | 414         |
|                   | Soybeans  | 0                                 | 0                 | n/a                              | 0         | 0         | n/a                          | n/a                   | 0                | 63          |
|                   | Wheat     | 0                                 | 11                | 0                                | 22        | 22        | 101                          | n/a                   | 145              | 434         |
|                   | All grain | 23                                | 11                | 205                              | 45        | 22        | 205                          | n/a                   | 204              | 911         |
| Atlantic          | Corn      | 0                                 | 88                | 0                                | 466       | 92        | 504                          | 647                   | n/a              | 607         |
|                   | Soybeans  | 102                               | 5                 | n/a                              | 340       | 417       | 82                           | 704                   | 173              | 1,085       |
|                   | Wheat     | 0                                 | 0                 | n/a                              | 0         | 0         | n/a                          | n/a                   | 0                | 81          |
|                   | All grain | 102                               | 93                | 110                              | 806       | 510       | 158                          | 666                   | 389              | 1,773       |
| All Regions       | Corn      | 2,002                             | 1,880             | 107                              | 21,603    | 19,264    | 112                          | 109                   | 137              | 78,486      |
|                   | Soybeans  | 779                               | 694               | 112                              | 14,267    | 11,944    | 119                          | 112                   | 123              | 36,851      |
|                   | Wheat     | 334                               | 386               | 86                               | 5,371     | 4,990     | 108                          | 84                    | 97               | 24,560      |
|                   | All grain | 3,175                             | 3,143             | 101                              | 43,406    | 36,449    | 119                          | 110                   | 128              | 141,803     |

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

Source: USDA, Federal Grain Inspection Service.

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 46 percent of U.S.-grown wheat, 47 percent of U.S.-grown soybeans, and 15 percent of the U.S.-grown corn. In 2025, approximately 51 percent of the U.S. export grain shipments departed through the U.S. Gulf region and 28 percent departed through the PNW.

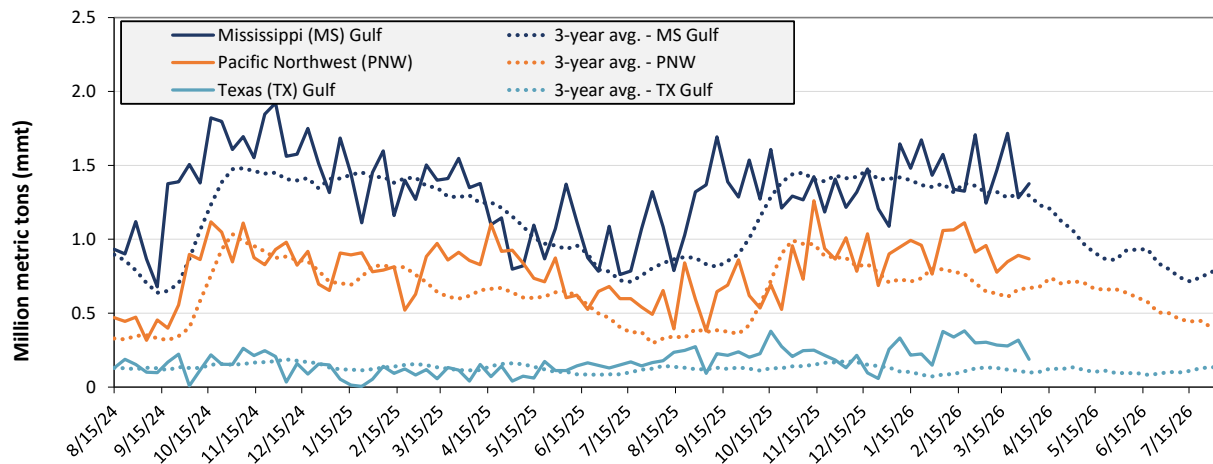
**Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)**



For the week ending April 2: 3.2 mmt of grain inspected, unchanged from the previous week, up 19 percent from the same week last year, and up 26 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 04/02/26 inspections (mmt):**

MS Gulf: 1.38

PNW: 0.87

TX Gulf: 0.19

| Percent change from:                   | MS Gulf | TX Gulf | U.S. Gulf | PNW    |
|----------------------------------------|---------|---------|-----------|--------|
| Last week                              | up 7    | down 41 | down 2    | down 3 |
| Last year (same 7 days)                | up 9    | up 371  | up 20     | up 8   |
| 3-year average (4-week moving average) | up 6    | up 93   | up 12     | up 30  |

Source: USDA, Federal Grain Inspection Service.

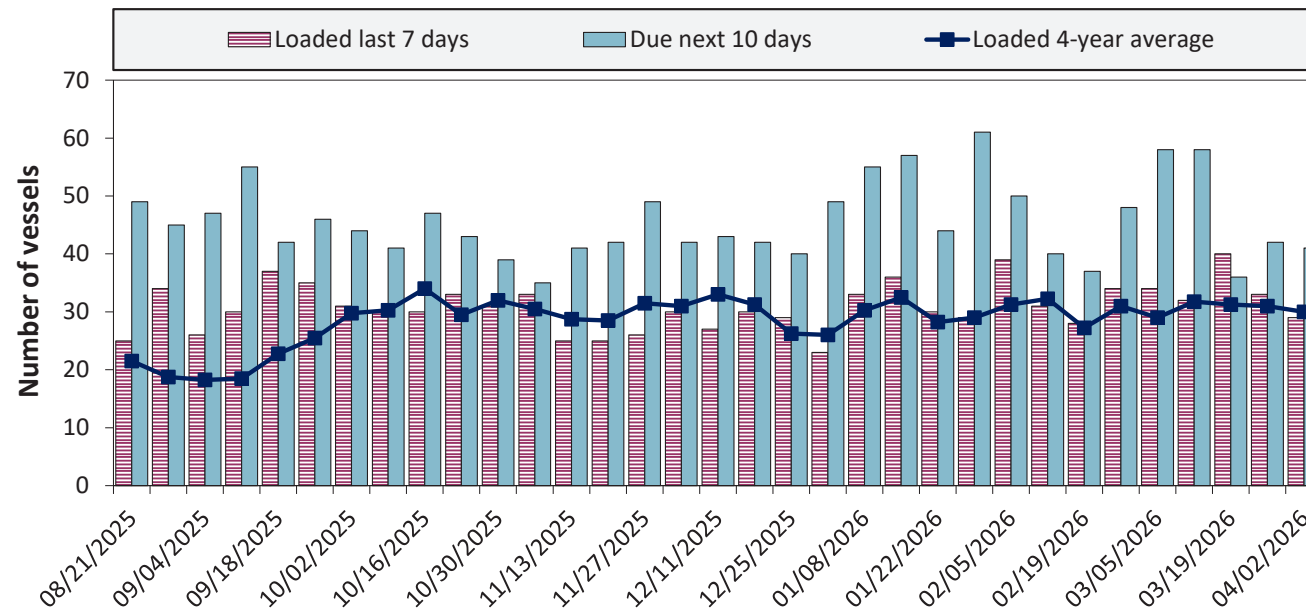
**Table 19. Weekly port region grain ocean vessel activity (number of vessels)**

| Date         | Gulf      |               |                  | Pacific Northwest |
|--------------|-----------|---------------|------------------|-------------------|
|              | In port   | Loaded 7-days | Due next 10-days | In port           |
| 4/2/2026     | 27        | 29            | 41               | 12                |
| 3/26/2026    | 39        | 33            | 42               | 14                |
| 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**

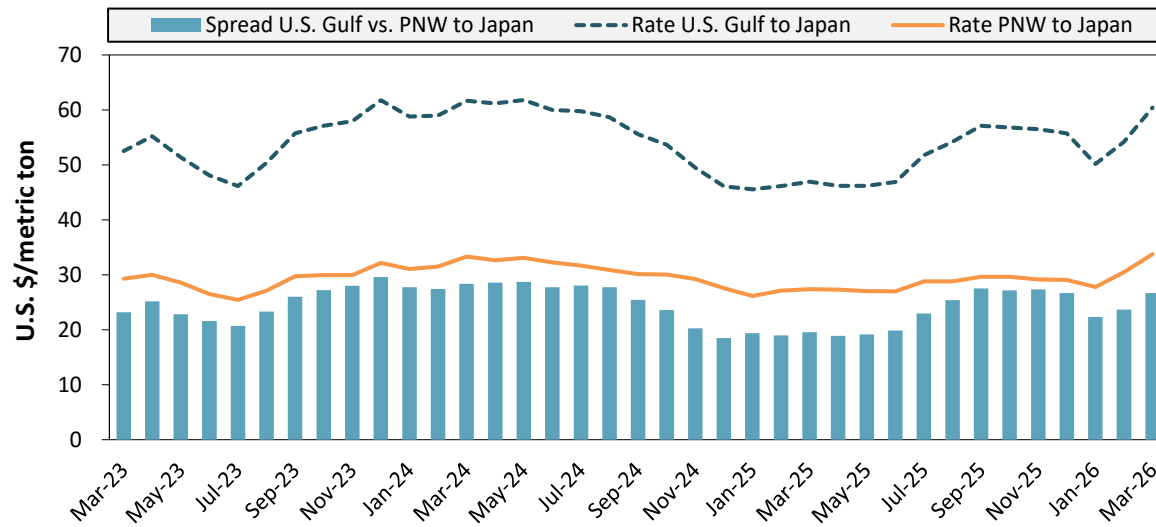


| Week ending 04/02/26,<br>number of vessels | Loaded | Due |
|--------------------------------------------|--------|-----|
| Change from last year                      | 4%     | 3%  |
| Change from 4-year average                 | -3%    | -5% |

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

Source: USDA, Agricultural Marketing Service.

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



Note: PNW = Pacific Northwest

Source: O'Neil Commodity Consulting /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 04/04/2026

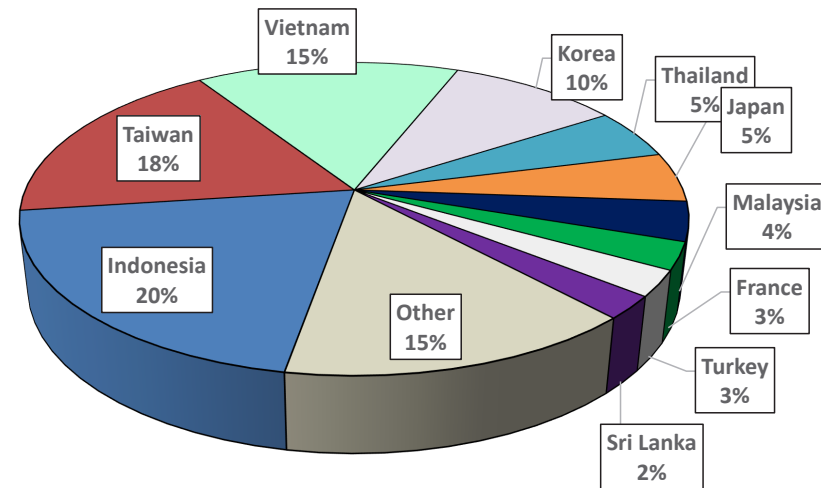
| Export region | Import region | Grain types  | Entry date   | Loading date        | Volume loads (metric tons) | Freight rate (US\$/metric ton) |
|---------------|---------------|--------------|--------------|---------------------|----------------------------|--------------------------------|
| U.S. 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                          |
| PNW           | Taiwan        | Wheat        | Apr 2, 2026  | May 30/Jun 13, 2026 | 51,300                     | 52.00                          |
| 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      | Soybeans     | Apr 2, 2026  | Apr 10/23, 2026     | 65,000                     | 53.00                          |
| 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 23, 2026 | Apr 15/24, 2026     | 66,000                     | 53.00                          |
| 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.

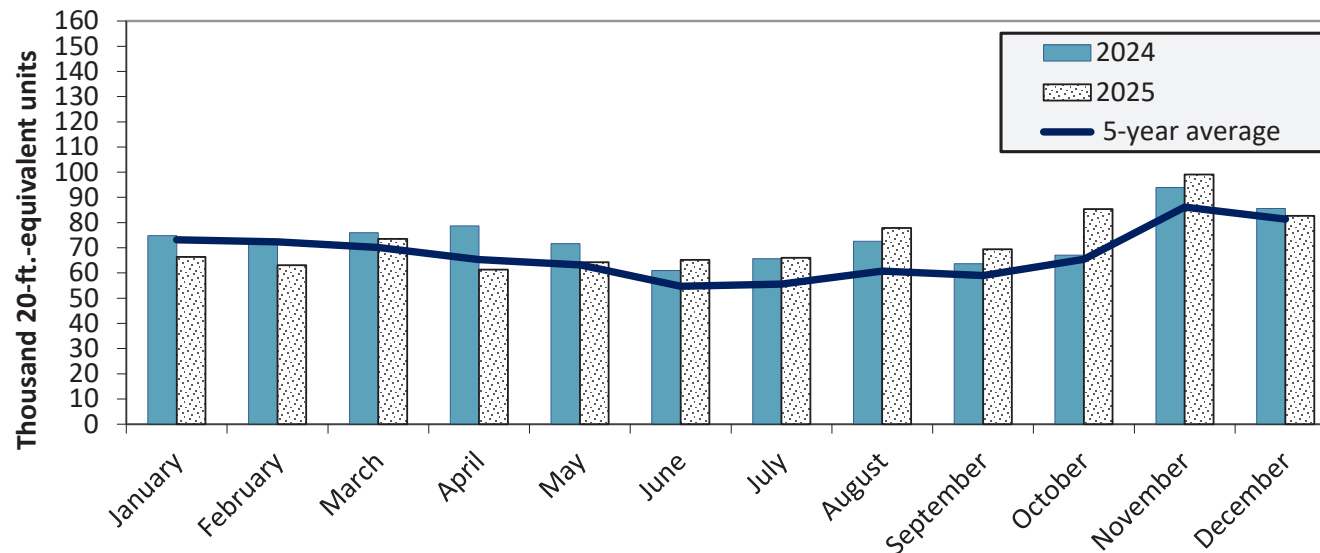
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Dec 2025



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 PIERS data, S&P Global.

Figure 22. Monthly shipments of U.S. containerized grain exports



Containerized grain shipments in December 2025 were down 3.5 percent from last year but up 1.6 percent from the 5-year average.

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

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

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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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