



Grain Transportation Report

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www.ams.usda.gov/GTR

MARAD Offers Nearly \$500 Million for Port Development. The Department of Transportation's Maritime Administration (MARAD) recently [announced a notice of funding opportunity](#) for \$489 million in fiscal year (FY) 2026 funding through MARAD's Port Infrastructure Development Program (PIDP).

PIDP aims to modernize the Nation's coastal and inland waterway ports and contribute to its long-term economic security and strong supply chains. PIDP funds will also help reduce carriers' shipping time, costs and, ultimately, the price of goods for the American people. Lists and descriptions of past awarded projects can be found [on MARAD's website](#).

The Infrastructure Investment and Jobs Act of 2021 provided \$450 million annually for PIDP, from FY 2022 to FY 2026. The deadline for FY 2026 applications is 11:59 pm ET on June 26, 2026.

BNSF Highlights \$500 Million Soybean Processing Plant in South Dakota. BNSF [recently highlighted](#) more than 100 projects completed by its customers in 2025, [including](#) a \$500 million High Plains Processing plant (near Mitchell, SD) of South Dakota Soybean Processors. [The facility](#) is designed to process 35 million bushels per year.

Grain customers on BNSF's network have made numerous investments in recent years, including CHS's 1.1-million-bushel shuttle facility in South Dakota ([GTR, February 9, 2023, first highlight](#)); Central Valley Ag's

5.5-million-bushel high-speed shuttle loader in Kansas ([GTR, July 20, 2023, fourth highlight](#)); and ALCIVIA's 3.9-million-bushel shuttle-loading facility in Wisconsin ([GTR, January 4, 2024, third highlight](#)).

FMCSA Investigates Benefits of Creating New Truck Parking. A [new study](#) by the Federal Motor Carrier Safety Administration (FMCSA) titled "Quantifying the Benefits of Creating New Truck Parking Spaces" will use roughly 1,000 survey responses from truck drivers to estimate the economic value of creating new truck parking spaces. Public comments are due by May 6.

FMCSA's research aims to determine the following: the average number of trucks parked in authorized and unauthorized areas per day; the most cost-effective methods for increasing truck parking capacity; the most often used and most effective truck parking information management systems; and the share of drivers who routinely make reservations, pay for parking, or use various other truck parking services.

In FMCSA's Federal Register notice, the agency noted the American Transportation Research Institute's 2024 trucking industry survey identified the lack of available truck parking as the overall industry's second-highest concern and truck drivers' top concern.



Bruce Leighty - stock.adobe.com

For additional transportation news related to grain and other agricultural products, see the [Transportation Updates and Regulatory News](#) page on AgTransport. A [dataset of all news entries since January 2023](#) is also available on AgTransport.

Export Sales

For the week ending April 9, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2025/26 totaled 32.92 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 1.40 mmt, up 3 percent from last week. Net [soybean export sales](#) were 0.25 mmt, down 16 percent from last week. Net [wheat export sales](#) were 0.10 mmt, down 39 percent from last week.

Rail

U.S. Class I railroads originated 30,716 [grain carloads](#) during the week ending April 4. This was a 6-percent increase from the previous week, 9 percent more than last year, and 20 percent more than the 3-year average.

Average April [shuttle secondary railcar bids/offers](#) (per car) were \$442 above tariff for the week ending April 9. This was \$125 less than last week and \$449 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$88 above tariff. This was \$9 less than last week, and \$163 lower than this week last year.

Barge

For the week ending April 11, [barged grain movements](#) totaled 505,000 tons. This was 6 percent less than the previous week and 10 percent less than the same week last year.

For the week ending April 11, 302 [barges moved down river](#), 30 fewer than the previous week. There were 658 grain barges unloaded in the New Orleans region, 14 percent less than the previous week.

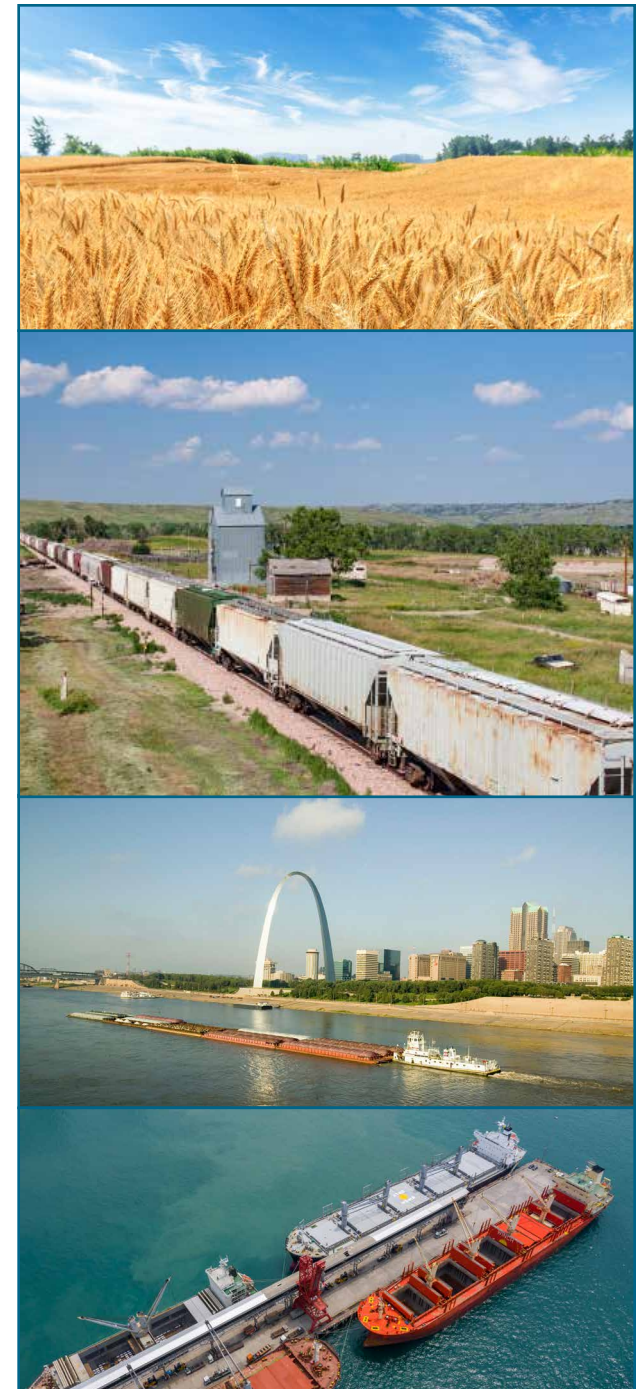
Ocean

For the week ending April 9, 30 [oceangoing grain vessels](#) were loaded in the Gulf—9 percent fewer than the same period last year. Within the next 10 days (starting April 10), 33 vessels were expected to be loaded—38 percent fewer than the same period last year.

As of April 9, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$64.75, up 2 percent from the previous week. The rate from the Pacific Northwest to Japan was \$34.75 per mt, up 2 percent from the previous week.

Fuel

For the week ending April 13, the [U.S. average diesel fuel price](#) decreased 3.5 cents from the previous week to \$5.608 per gallon, 202.9 cents above the same week last year.



Grain Stocks, Disappearance, and Plantings: Quarterly View and Outlook

Each year, by December 1, nearly all the U.S. grain available for transport for the rest of the marketing year is in storage.¹ Thus, grain transportation demand is closely connected to stocks of grain held in storage. Because of this connection, tracking changes in grain stocks over time—along with complementary rail, barge, and export data—provides insight into recent past, current, and future demand for grain transportation.

This article bases its analysis on the latest [Grain Stocks report](#)—March 1, 2026—from USDA's National Agricultural Statistics Service (NASS). The first section looks at grain disappearance and transportation demand in the second quarter of marketing year (MY) 2025/26, which runs from December 1 through the end of February for corn and soybeans.² The second section analyzes the March 1 grain stocks snapshot across the States to provide a geographic perspective on transportation demand. The final section reviews the recent [Prospective Plantings report](#) from NASS.

A Look Back: December 1, 2025, to March 1, 2026

Record-High Grain Stocks Signaled Transportation Gains. Following a record corn harvest (and the seventh-largest soybean harvest), grain stocks as of December 1, 2025, were a record high 483.1 million metric tons (mmt), 56.0 mmt (+13 percent) above average.³ Most of the increase came from higher corn stocks (up 41.1 mmt from average). At 328.9 mmt, grain stocks as of March 1, 2026, were also high—up 14 percent from average.

The difference between March 1, 2026, grain stocks and December 1, 2025, grain stocks (plus grain imports over that span) was a record 155.4 mmt, 14.2 mmt (+10 percent) above average.⁴ Compared to average, quarterly disappearance by crop was as follows: corn, up 14.3 mmt (+15 percent); soybeans, down 1.2 mmt (−4 percent); and wheat, up 0.7 mmt (+7 percent).

Above-Expected Carloads Suggested Modal Shift Into Rail. Disappearance (or use) is an indicator for transportation, because grain consumed for export, feed, food, industrial, and other purposes uses the barge, rail, and highway networks.⁵ Assuming [historical \(2018-22\) modal shares for grain](#)—64 percent for truck, 24 percent for rail, and 13 percent for barge—the additional 14.2 mmt of grain (above average) roughly equates to 401,000 truckloads; 34,200 carloads; and 1,200 barges.

[Grain Transportation Report \(GTR\) table 3](#) and [figure 14](#) contain weekly data on two of the modes, rail and barge. Over the quarter, carloads originated by Class I railroads—which have been strong for months ([GTR fig. 3](#))—were 56,200 cars (+17 percent) above average. Almost 600 more grain barges than average (+6 percent) were unloaded in the New Orleans region, about half of the rough-thumb estimate (in the previous paragraph). Compared to the historical-modal-share-based volumes, the actual transportation numbers suggest some modal shift into rail and away from barge.

¹ Imports can also add to grain supplies during the marketing year, but are usually a small amount (about 1 percent of annual grain supplies).

² This time span represents the third quarter of the marketing year for small grains, such as wheat, barley, and oats.

³ This sum includes corn, soybeans, wheat, grain sorghum, barley, and oats. Unless otherwise noted, “average” refers to the average of the prior 3 years.

⁴ Mathematically, the calculation is “December 1 stocks” plus any “grain imports in December, January, and February” minus “March 1 stocks.” From December 2025 through February 2026, the U.S. imported 1.2 mmt of grain, down 11 percent from average. In this article, import and export data are at the 4-digit Harmonized System code level: 1001 for wheat, 1003 for barley, 1004 for oats, 1005 for corn, 1007 for sorghum, and 1201 for soybeans.

⁵ Disappearance (or use) is not necessarily a one-to-one measure with transportation, since a bushel can only be used once, but may be moved more than once (e.g., grain trucked or railed to a river terminal) or not at all (in the case of spoilage or on-farm use). A bushel may also change position—for example, from an interior elevator to a port terminal—which would involve transportation but no disappearance.

Corn and Wheat Drove Rises in Export Shipments.

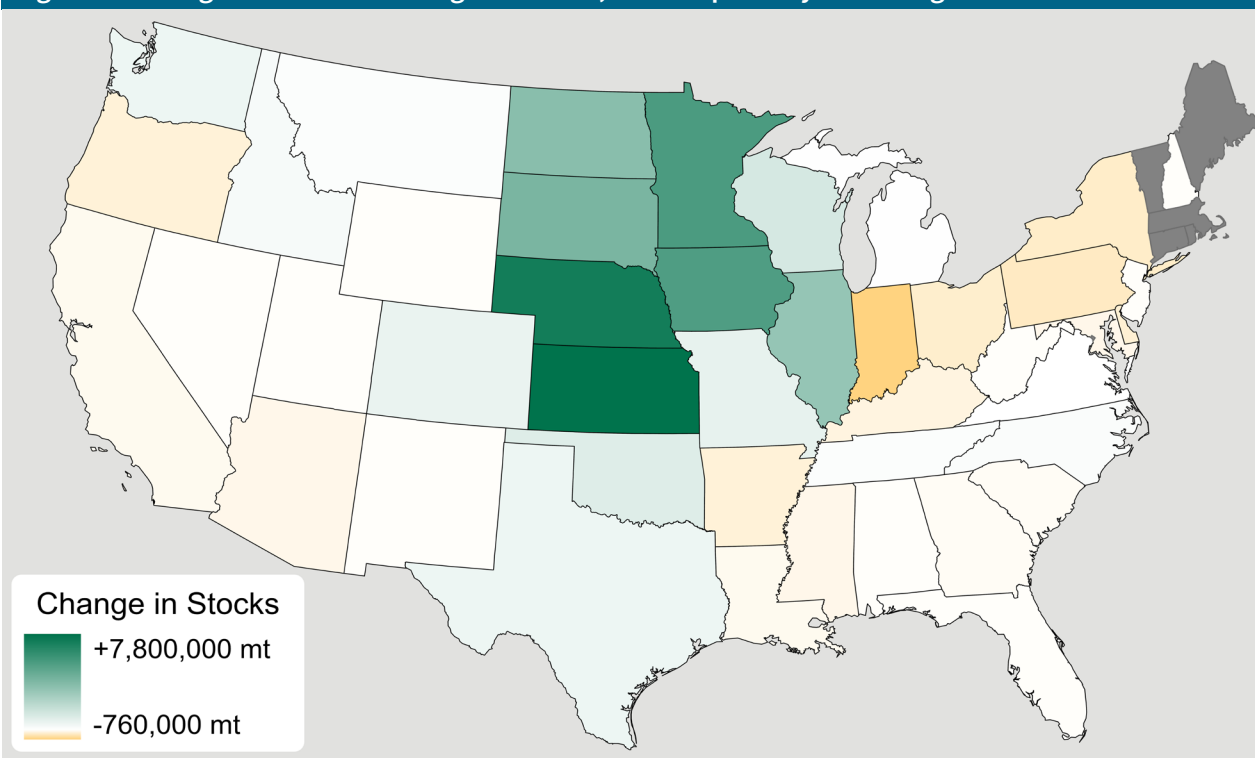
Both rail and barge supply a majority of grain destined for export. Grain exports from December through February were strong, up 4.5 mmt (+12 percent) from average. This increase was driven by much higher corn and higher wheat exports, up 6.6 mmt (+48 percent) and 0.6 mmt (+13 percent) from average, respectively. On the other hand, soybean exports were 3.3 mmt (–19 percent) below average. Exports out of major rail-served destinations like the Pacific Northwest and Texas Gulf were particularly high—up 2.2 mmt (+23 percent) and up 1.4 mmt (+103 percent), respectively.

Taking total disappearance and netting out exports measures domestic use, which relies more heavily on truck and rail transportation. By this measure, domestic use in the quarter was a record 113.2 mmt, up 9.7 mmt (+9 percent) from average. Each major grain saw above average domestic use: corn, up 7.6 mmt (+9 percent); soybeans, up 2.1 mmt (+14 percent); and wheat, up 0.1 mmt (+2 percent).

Current Conditions and Beyond (Based on March 1, 2026, Grain Stocks)

High Stocks for All Grains Signaled Strong Demand for Transport. Grain stocks as of March 1, 2026, were 41.6 mmt above average. About 60 percent of that increase was on-farm grain that (as of March 1) had yet to enter transportation channels. All three major grains were above average: corn, up 26.9 mmt (+13 percent); soybeans, up 7.9 mmt (+16 percent); and wheat, up 5.8 mmt (+19 percent).

Figure 1. Changes in State March 1 grain stocks, 2026 vs prior 3-year average



Source: USDA Agricultural Marketing Service analysis of USDA/NASS data.

High grain stocks suggested strong demand for grain transportation post-March 1. Using the same modal shares from the previous section as a rough gauge, the 41.6 mmt of extra grain equates to 1.2 million more trucks; 100,100 more carloads; and 3,400 more barges.

Since March 1, rail and barge shipments have been strong. Compared to average for the past 5 weeks (through April 4), railroads originated 25,800 more carloads (+21 percent) and barge unloads in the New Orleans region were 390 higher (+11 percent). Emanating from these modes, grain volumes inspected for export have remained strong in recent weeks too ([GTR fig. 18](#)).

In Top 7 States: Above-Average Stocks Likely To Increase Grain Transportation.

To examine the geographic distribution of the March 1 stocks, the map (fig. 1) shows how each State's March 1 stocks compared to average. Seven States accounted for 88 percent of the above-average stocks across the United States. These included Kansas, up 7.8 mmt; Nebraska, up 7.2 mmt; Minnesota, up 5.5 mmt; Iowa, up 5.4 mmt; South Dakota, up 4.1 mmt; North Dakota, up 3.6 mmt; and Illinois, up 3.2 mmt. These States will (all else equal) likely see above-average transportation activity for the rest of the year.

In recent weeks, these higher stocks have been reflected in above-average grain carloads in States that rely heavily on rail transportation.

According to the Surface Transportation Board's grain car loaded and billed data ([available on AgTransport](#)), compared to average for the past 5 weeks (through April 4), Kansas loaded 9,400 more cars (+118 percent)—followed by Nebraska, up 7,500 cars (+72 percent); South Dakota, up 4,800 cars (+55 percent); and North Dakota, up 3,600 cars (+20 percent).

However, two States with below-average grain stocks on March 1 were Indiana, down 0.8 mmt, and Ohio, down 0.2 mmt ([fig. 1](#)). Because both States supply grain to Southeast livestock and poultry operations, the lower grain stocks mean slightly lower feed availability along that corridor. Since March, grain carloads have been 1,000 cars above average in Indiana (+14 percent), but 1,500 cars below average in Ohio (–21 percent).

A Look Ahead: Prospective Plantings

The March 1 grain stocks data are particularly relevant to the demand for grain transportation in the current marketing year. The annual March Prospective Plantings report from NASS signals the potential demand for transportation in the next marketing year, beginning June 1, for wheat and other small grains, and September 1, for corn and soybeans.

NASS projects wheat planted acreage to drop 3.3 million acres from average (–7 percent)—if realized, the lowest since records began in 1919. Kansas, Montana, and North Dakota account for 55 percent of the drop. NASS projects corn acreage to fall 3.5 million acres (–3 percent) from last year's record, but remain 0.6 million acres above average (+1 percent). Compared to average, Kansas has the largest increase, with 0.8 million more corn acres (+13 percent), and Wisconsin has the largest drop, with 0.3 million fewer acres (–7 percent).

Finally, U.S. soybean acreage is projected to rise 0.7 million acres above average (+1 percent), including 0.4 million more acres in South Dakota (+7 percent); 0.3 million more acres in Wisconsin (+14 percent); and 0.3 million more acres in North Dakota (+4 percent).

How the acreage changes will affect overall grain supply—and ultimately grain transportation demand—is difficult to discern. However, the notable increases in Kansas's corn acreage and the Dakotas' soybean acreage point to clear changes in commodity mixes by location.

NASS's acreage estimates were based on surveys conducted the first 2 weeks of March—somewhat coinciding with increases in fertilizer prices ([GTR, April 9, 2026](#)), so they may change. NASS will release new estimates in its *Acreage* report on June 30. Before then, however, USDA will publish adjusted production estimates for MY 2026/27 in its May 12 *World Agricultural Supply and Demand Estimates* report, projections first provided in February ([GTR, February 26, 2026, first highlight](#)).

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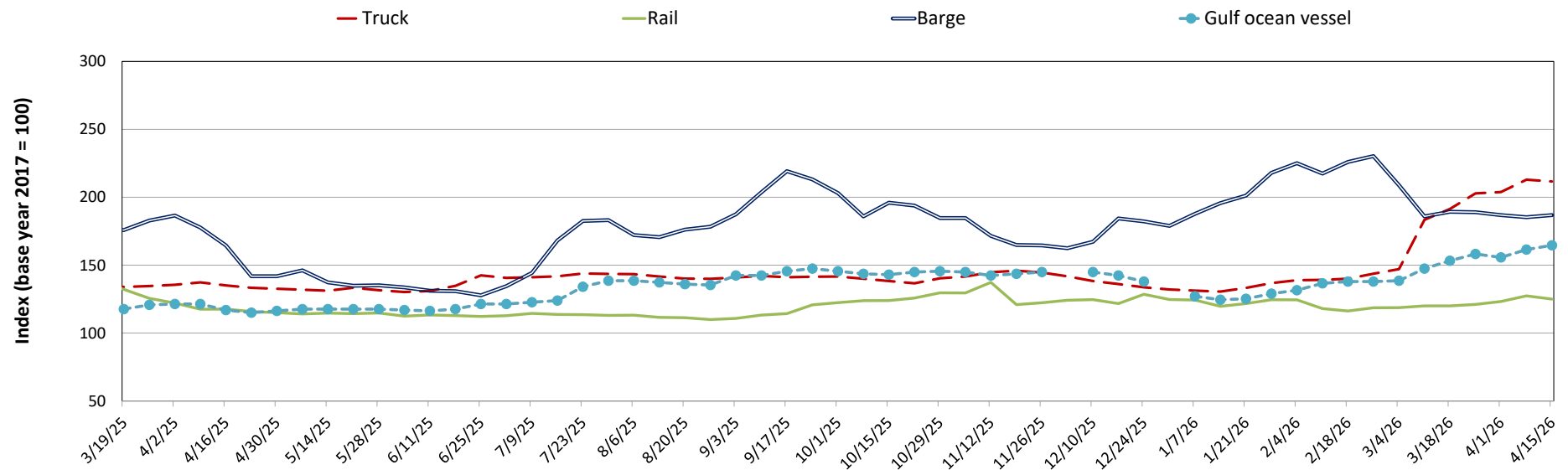
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
04/15/26	212	125	187	165	165
04/08/26	213	127	185	161	162
04/16/25	135	118	165	117	128

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.

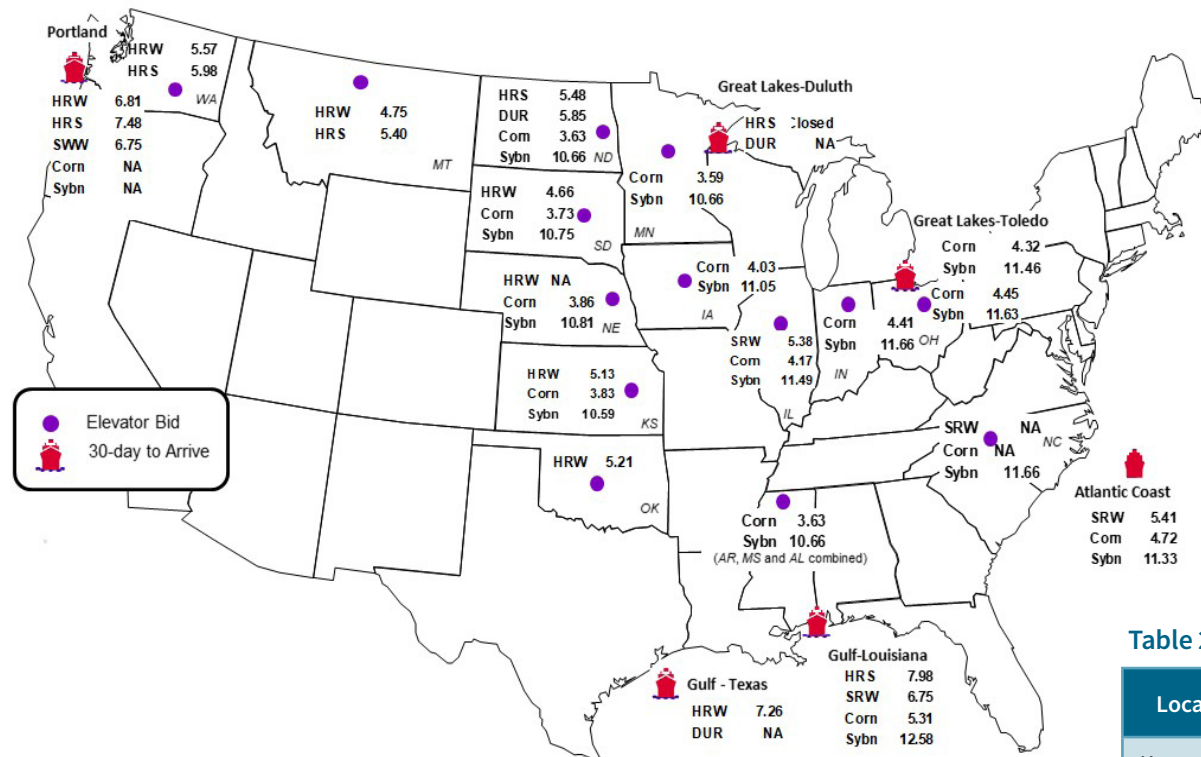
Figure 1. Grain transportation cost indicators as of week ending 4/15/26



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	4/10/2026	4/2/2026
Corn	IL-Gulf	-1.14	-1.12
Corn	NE-Gulf	-1.45	-1.44
Soybean	IA-Gulf	-1.53	-1.50
HRW	KS-Gulf	-2.13	-2.18
HRS	ND-Portland	-2.00	-2.00

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	4/10/2026	Week ago 4/2/2026	Year ago 4/11/2025
Kansas City	Wheat	May	5.908	6.156	5.582
Minneapolis	Wheat	May	6.115	6.468	6.150
Chicago	Wheat	May	5.710	5.982	5.490
Chicago	Corn	May	4.410	4.522	4.894
Chicago	Soybean	May	11.756	11.634	10.476

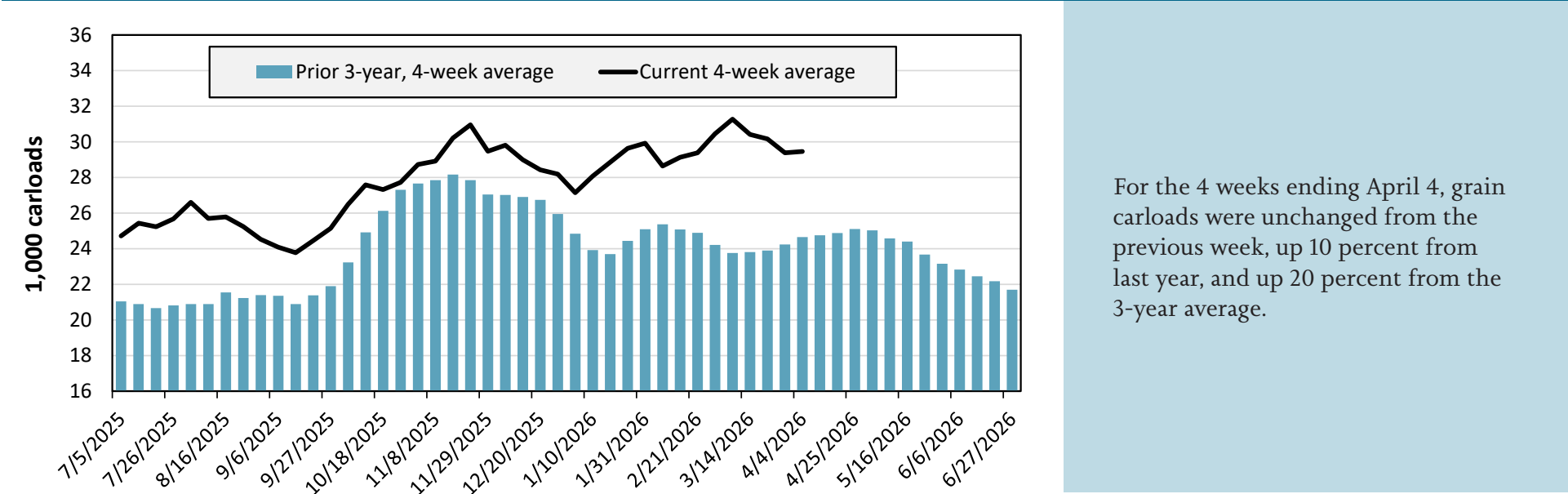
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 4/04/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,470	2,371	13,906	7,305	3,764	1,900	30,716
This week last year	1,307	2,312	12,701	6,950	2,447	2,384	28,101
2026 YTD	19,777	34,990	172,464	92,677	46,237	23,624	389,769
2025 YTD	23,587	39,617	151,496	79,305	34,312	19,575	347,892
2026 YTD as % of 2025 YTD	84	88	114	117	135	121	112
Last 4 weeks as % of 2025	102	99	110	110	123	113	110
Last 4 weeks as % of 3-yr. avg.	90	105	125	115	132	139	120
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: 4/3/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	26.3	26.6	26.9	18.2	8.4	21.8	21.4
	Average over last 4 weeks	36.4	28.5	25.6	19.7	13.5	18.8	23.7
	Average of same 4 weeks last year	40.2	30.9	21.1	17.0	7.9	n/a	23.4
Average grain unit train speeds (miles per hour)	This week	23.4	17.0	24.3	23.2	22.1	17.9	21.3
	Average over last 4 weeks	22.6	17.7	23.9	23.2	21.7	18.4	21.2
	Average of same 4 weeks last year	21.5	19.0	24.1	21.4	23.6	n/a	21.9

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

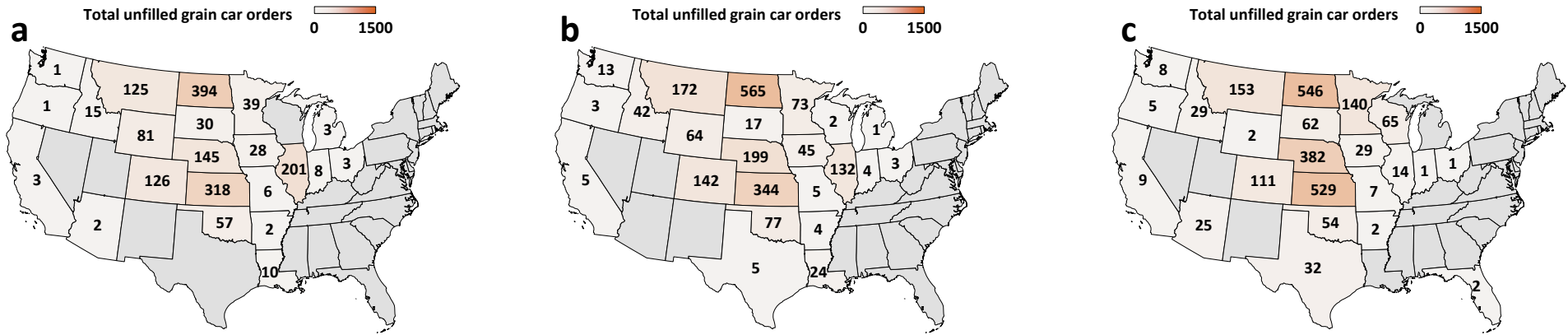
For the week ending: 4/3/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	62	21	370	53	30	411	947
	Average over last 4 weeks	47	16	402	58	16	315	852
	Average of same 4 weeks last year	64	9	296	100	10	n/a	479
Average number of loaded grain cars not moved in over 48 hours	This week	45	130	423	31	37	305	971
	Average over last 4 weeks	60	159	509	50	27	328	1,132
	Average of same 4 weeks last year	142	168	365	79	5	n/a	760
Average number of grain unit trains held	This week	0	1	5	3	1	6	17
	Average over last 4 weeks	0	1	6	4	1	5	17
	Average of same 4 weeks last year	1	0	16	8	1	n/a	25
Total unfilled manifest grain car orders	This week	30	0	698	669	0	201	1,598
	Average over last 4 weeks	14	7	870	796	0	250	1,937
	Average of same 4 weeks last year	5	5	516	1,116	0	n/a	1,642

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](#).

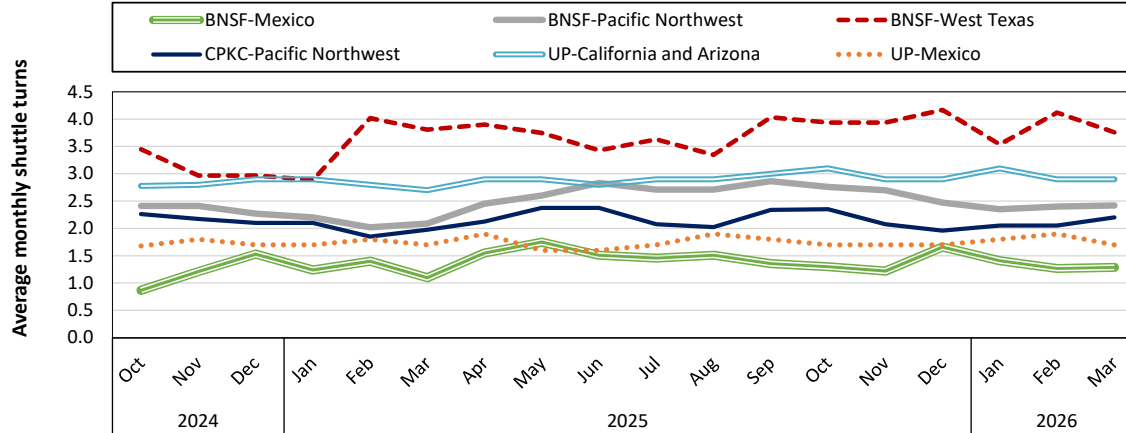
Source: Surface Transportation Board.

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

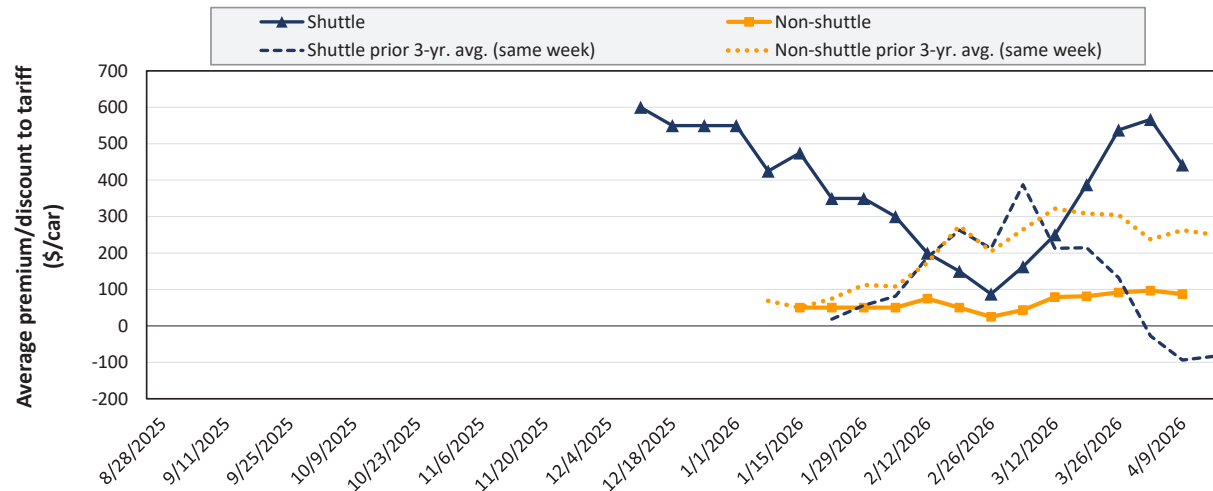


In March 2026, BNSF Railway's average monthly grain shuttle turns were 1.3 to Mexico, 2.4 to the Pacific Northwest, and 3.8 to West Texas. CPKC's shuttle turns averaged 2.2 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.7 to Mexico.

Note: A "shuttle turn" refers to the number of trips completed per month by a single train. Additional data (including additional regions and planned turns) are available on [AgTransport](https://www.agtransport.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



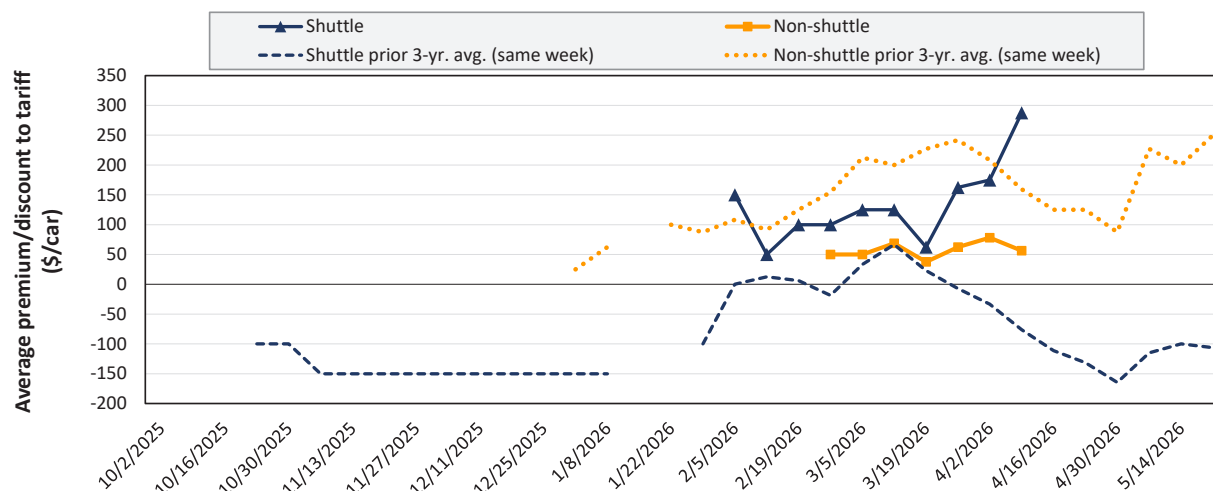
Average non-shuttle bids/offers fell \$9 this week, and are \$9 below the peak.

Average shuttle bids/offers fell \$125 this week and are \$158 below the peak.

4/9/2026	BNSF	UP
Non-Shuttle	\$88	n/a
Shuttle	\$650	\$233

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



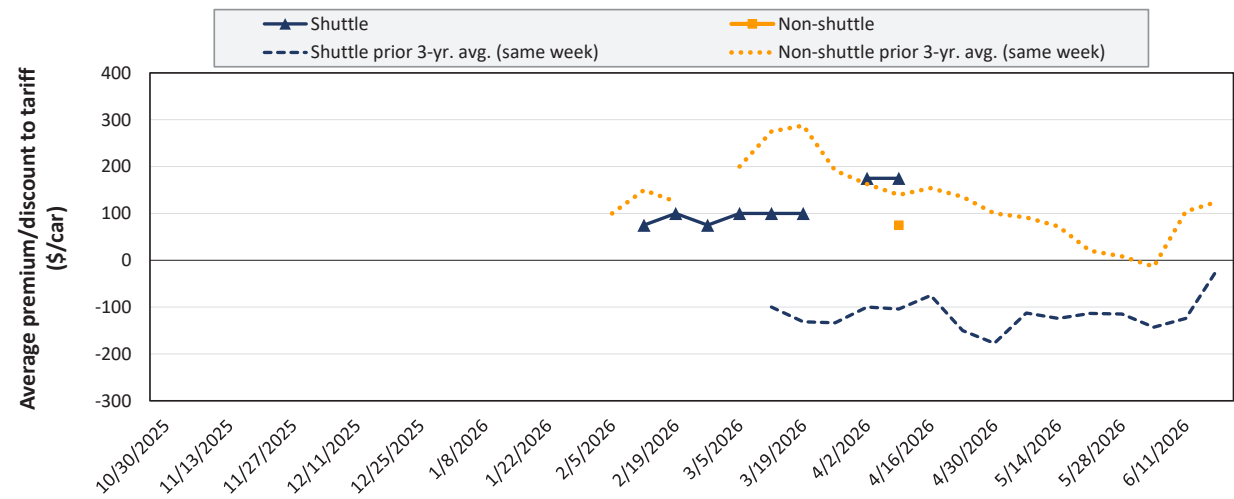
Average non-shuttle bids/offers fell \$22 this week, and are \$22 below the peak.

Average shuttle bids/offers rose \$113 this week and are at the peak.

4/9/2026	BNSF	UP
Non-Shuttle	\$38	\$75
Shuttle	\$375	\$200

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 last week. Average non-shuttle bids/offers this week are at the peak.

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

4/9/2026	BNSF	UP
Non-Shuttle	\$50	\$100
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: 4/9/2026		Delivery period					
		Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26
Non-shuttle	BNSF	88	38	50	n/a	n/a	n/a
	Change from last week	44	-1	n/a	n/a	n/a	n/a
	Change from same week 2025	-163	-119	-50	n/a	n/a	n/a
	UP	n/a	75	100	n/a	n/a	n/a
	Change from last week	n/a	-44	n/a	n/a	n/a	n/a
	Change from same week 2025	n/a	38	63	n/a	n/a	n/a
Shuttle	BNSF	650	375	175	50	n/a	n/a
	Change from last week	-125	125	0	25	n/a	n/a
	Change from same week 2025	544	300	175	n/a	n/a	n/a
	UP	233	200	n/a	n/a	n/a	n/a
	Change from last week	-125	100	n/a	n/a	n/a	n/a
	Change from same week 2025	354	400	n/a	n/a	n/a	n/a
	CPKC	142	100	25	n/a	n/a	n/a
	Change from last week	-83	0	75	n/a	n/a	n/a
	Change from same week 2025	42	0	100	n/a	n/a	n/a

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

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

Table 6. Rail tariff rates for wheat shipments, April 2026

Primary wheat class	Railroad	Origin	Destination	Train type	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Durum	BNSF	Williston, ND	St. Louis, MO	Shuttle	\$5,832	\$123.40	\$5,955.40	\$1.61	\$59.14	3.3
	BNSF	Williston, ND	Superior, WI	Shuttle	\$4,291	\$61.70	\$4,352.70	\$1.18	\$43.22	4.7
	CPKC	Westby, MT	St. Louis, MO	Unit	\$5,788	\$845.61	\$6,633.61	\$1.79	\$65.87	10.0
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	\$4,804	\$71.50	\$4,875.50	\$1.32	\$48.42	4.1
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	\$6,215	\$171.90	\$6,386.90	\$1.73	\$63.43	3.3
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	\$2,865	\$33.20	\$2,898.20	\$0.78	\$28.78	7.4
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	\$5,732	\$178.90	\$5,910.90	\$1.60	\$58.70	5.5
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	\$5,838	\$151.40	\$5,989.40	\$1.62	\$59.48	3.7
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	\$5,412	\$125.60	\$5,537.60	\$1.50	\$54.99	4.0
	CPKC	Minot, ND	Kalama, WA	Unit	\$5,298	\$748.70	\$6,046.70	\$1.63	\$60.05	2.6
	CPKC	Nekoma, ND	Chicago, IL	Manifest	\$5,030	\$449.96	\$5,479.96	\$1.48	\$54.42	8.2
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	\$3,400	\$65.00	\$3,465.00	\$0.94	\$34.41	-11.5
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	\$3,600	\$79.70	\$3,679.70	\$0.99	\$36.54	-13.6
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	\$5,800	\$214.80	\$6,014.80	\$1.63	\$59.73	-12.9
	BNSF	Garden City, KS	San Bernardino, CA	DET	\$5,700	\$151.00	\$5,851.00	\$1.58	\$58.10	-0.5
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,200	\$110.00	\$4,310.00	\$1.16	\$42.80	-11.6
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,000	\$113.60	\$4,113.60	\$1.11	\$40.85	-12.3
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	\$3,500	\$93.60	\$3,593.60	\$0.97	\$35.69	-14.2
	BNSF	Wichita, KS	Chicago, IL	DET	\$3,700	\$63.80	\$3,763.80	\$1.02	\$37.38	-12.2
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	\$3,900	\$101.80	\$4,001.80	\$1.08	\$39.74	-10.7
	UP	Byers, CO	Houston, TX	Shuttle	\$4,525	\$383.79	\$4,908.79	\$1.33	\$48.75	-7.3
	UP	Goodland, KS	Kansas City, MO	Manifest	\$4,967	\$143.55	\$5,110.55	\$1.38	\$50.75	1.9
	UP	Medford, OK	Houston, TX	Shuttle	\$3,775	\$189.42	\$3,964.42	\$1.07	\$39.37	-9.0
	UP	Salina, KS	Houston, TX	Shuttle	\$4,025	\$252.45	\$4,277.45	\$1.16	\$42.48	-8.4
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	\$4,791	\$77.20	\$4,868.20	\$1.32	\$48.34	4.1
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	\$4,439	\$97.50	\$4,536.50	\$1.23	\$45.05	5.0
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	\$2,032	\$48.00	\$2,080.00	\$0.56	\$20.66	0.5
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	\$8,611	\$0.00	\$8,611.00	\$2.33	\$85.51	3.2
	CSX	Chicago, IL	Albany, NY	Unit	\$7,676	\$0.00	\$7,676.00	\$2.07	\$76.23	3.5
	CSX	Chicago, IL	Buffalo, NY	Manifest	\$6,102	\$0.00	\$6,102.00	\$1.65	\$60.60	3.0
	CSX	Chicago, IL	Indiantown, FL	Manifest	\$8,832	\$0.00	\$8,832.00	\$2.39	\$87.71	3.1

Note: Chicago, IL, serves as an interchange point between eastern and western Class I railroads. In the table above, all routes with Chicago as either an origin or destination are subject to “[Rule 11](#)”—meaning their rate must be combined with a tariff rate from another railroad. (For example, rates for Wichita, KS, to Albany, NY, would combine Wichita to Chicago and Chicago to Albany.) All rates (except Goodland, KS, to Kansas City, MO) are for railroad-owned, large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). The Goodland-to-Kansas City route is for small covered hoppers (C-113), which each carry 100 short tons (90.7 metric tons). A bushel of wheat weighs 60 pounds. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge. DET = Domestic Efficiency Trains. DET trains—on BNSF Railway (BNSF) only—are composed of 110 cars loaded at a single origin and split en route to multiple destinations. For mileage calculations, BNSF uses “Seattle, WA” for all Pacific Northwest (PNW) locations and “Houston, TX” for all Texas Gulf locations. HRS = hard red spring. HRW = hard red winter. CPKC = Canadian Pacific Kansas City. CSX = CSX Transportation. UP = Union Pacific Railroad. A larger dataset (with additional routes, calculations, and shipment characteristics) is available on [AgTransport](#).

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

Table 7. Rail tariff rates for corn and soybean unit/shuttle train shipments, April 2026

Commodity	Railroad	Origin	Destination	Car Ownership	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Corn	BNSF	Clarkfield, MN	Hereford, TX	Railroad	\$5,600	\$111.30	\$5,711.30	\$1.44	\$56.72	-3.5
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	\$5,470	\$191.40	\$5,661.40	\$1.43	\$56.22	0.1
	BNSF	Edison, NE	Hanford, CA	Railroad	\$5,460	\$184.40	\$5,644.40	\$1.42	\$56.05	-8.9
	BNSF	Edison, NE	Hereford, TX	Railroad	\$4,500	\$78.60	\$4,578.60	\$1.15	\$45.47	-10.6
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	\$5,350	\$211.40	\$5,561.40	\$1.40	\$55.23	0.3
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	\$4,620	\$94.10	\$4,714.10	\$1.19	\$46.81	1.1
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	\$4,260	\$76.80	\$4,336.80	\$1.09	\$43.07	-11.2
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	\$4,000	\$118.20	\$4,118.20	\$1.04	\$40.90	-11.3
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	\$5,430	\$166.50	\$5,596.50	\$1.41	\$55.58	0.2
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	\$5,430	\$188.70	\$5,618.70	\$1.42	\$55.80	0.1
	CN	Gibson City, IL	Reserve, LA	Private	\$2,301	\$321.90	\$2,622.90	\$0.66	\$26.05	9.4
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,681	\$321.90	\$3,002.90	\$0.76	\$29.82	8.1
	CPKC	Delhi, LA	Morton, MS	Railroad	\$1,342	\$47.60	\$1,389.60	\$0.35	\$13.80	0.1
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,047	\$861.05	\$5,908.05	\$1.49	\$58.67	7.4
	CPKC	Glenwood, MN	Boardman, OR	Railroad	\$5,513	\$828.57	\$6,341.57	\$1.60	\$62.97	6.6
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	\$6,241	\$0.00	\$6,241.00	\$1.57	\$61.98	4.7
	CSX	Marysville, OH	Rose Hill, NC	Railroad	\$6,378	\$0.00	\$6,378.00	\$1.61	\$63.34	3.9
	CSX	Olney, IL	Fairmount, GA	Railroad	\$4,891	\$0.00	\$4,891.00	\$1.23	\$48.57	3.9
	UP	Allen Station (San Jose), 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](#).

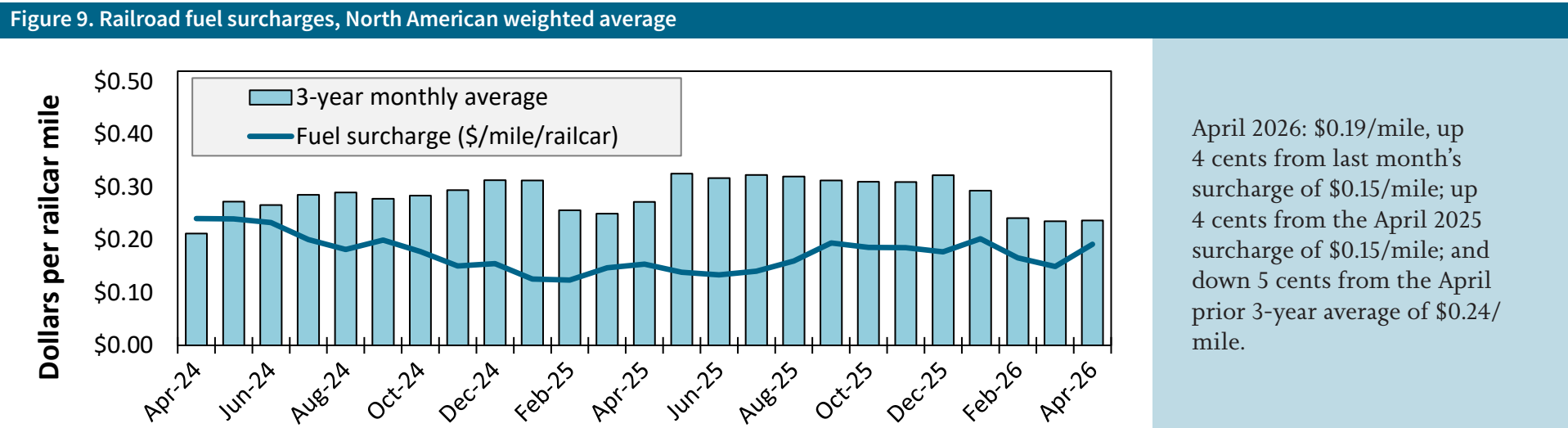
Source: BNSF Railway, Canadian National Railway, CPKC, CSX Transportation, and Union Pacific Railroad.

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%

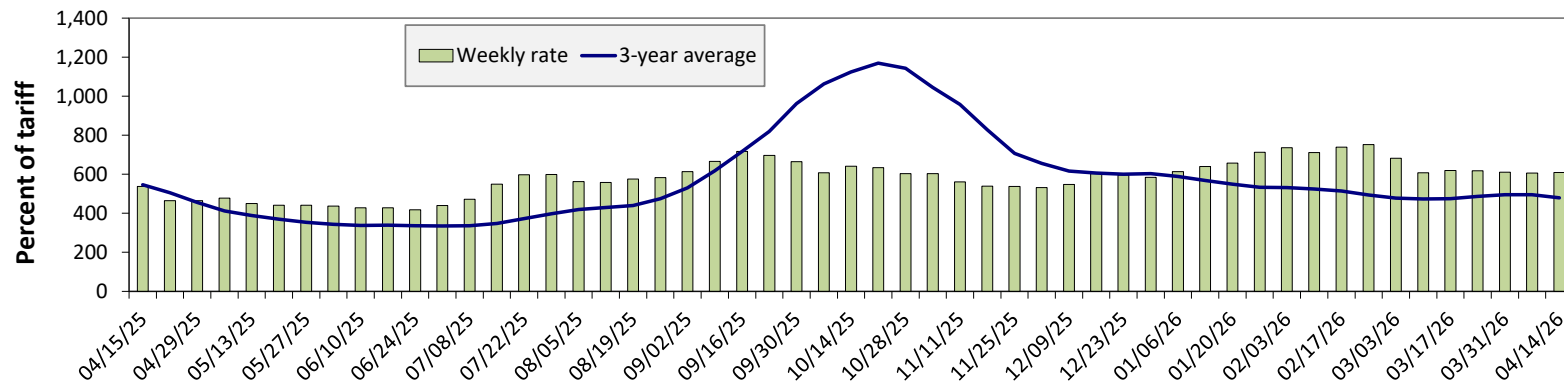
Note: After December 2021, U.S. railroads stopped reporting "through rates" from the U.S. origin to the Mexican destination. Thus, the table shows "Rule 11 rates," which cover only the portion of the shipment from a U.S. origin to locations on the U.S.-Mexico border. The Rule 11 rates apply only to shipments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



Note: Weighted by each Class I railroad's proportion of grain traffic for the prior year.
Source: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Figure 10. Illinois River barge freight rate



For the week ending April 14: 1 percent higher than the previous week; 14 percent higher than last year; and 27 percent higher than the 3-year average.

Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year average.

Source: USDA, Agricultural Marketing Service.

Table 9. Weekly barge freight rates: southbound only

Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	4/14/2026	739	647	609	458	492	375
	4/7/2026	713	649	606	457	508	372
\$/ton	4/14/2026	45.74	34.42	28.26	18.27	23.07	11.78
	4/7/2026	44.13	34.53	28.12	18.23	23.83	11.68
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	23	13	13	15	25	8
	3-year avg.	44	31	27	31	34	24
Rate	May	686	609	563	445	466	358
	July	650	580	512	423	448	349

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](#).

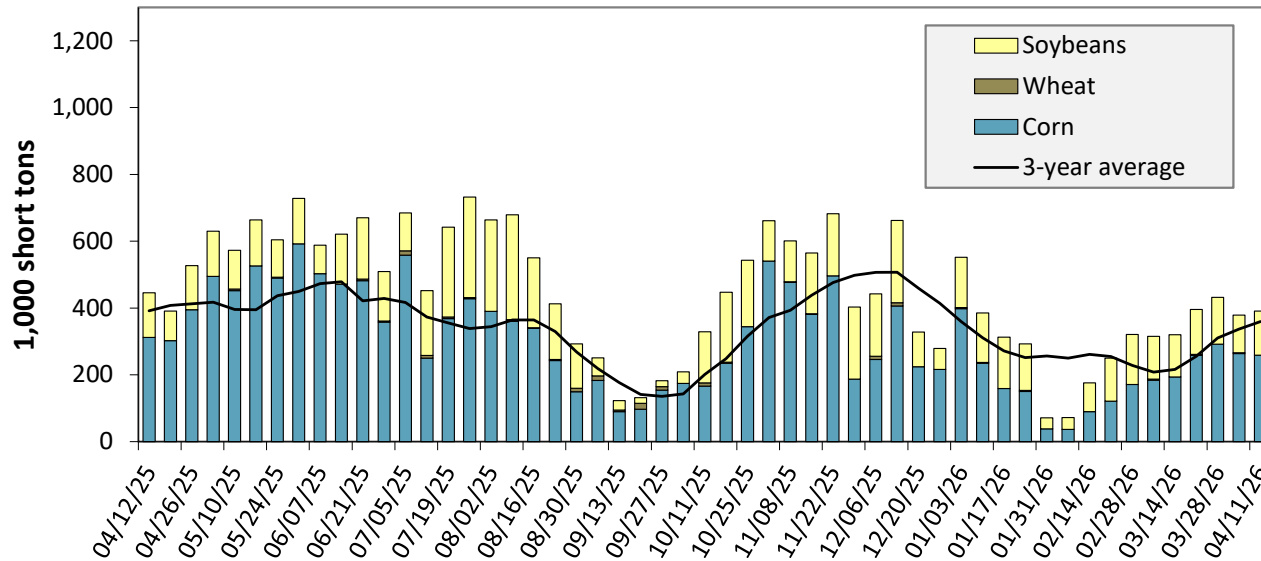
Source: USDA, Agricultural Marketing Service.

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 11: 12 percent lower than last year and 9 percent higher than the 3-year average.

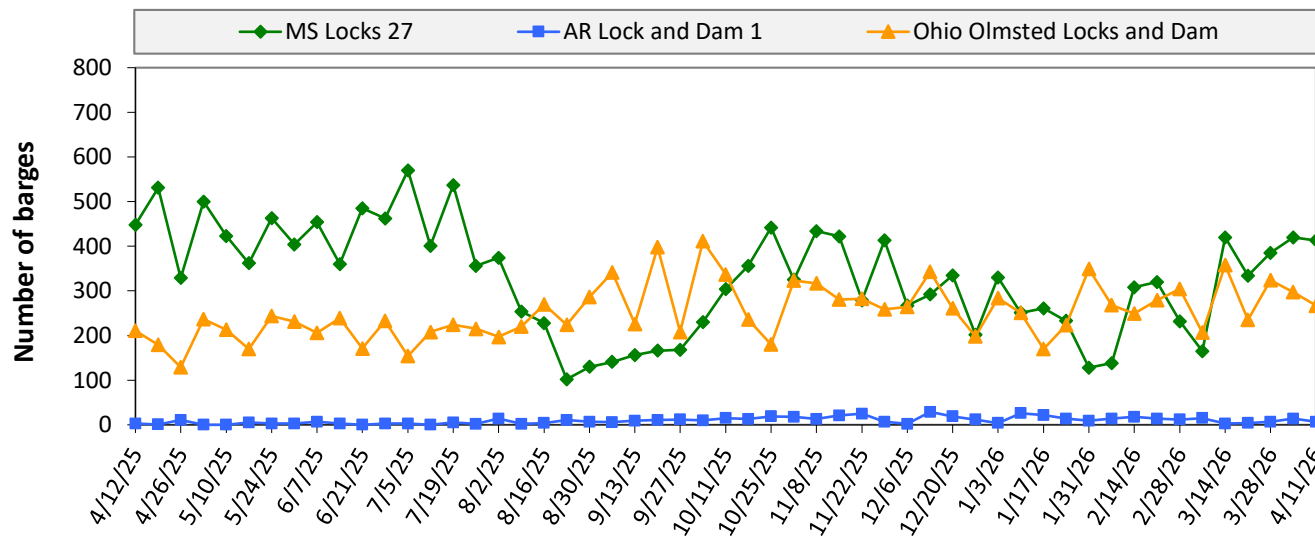
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 04/11/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	60	0	50	0	110
Mississippi River (Winfield, MO (L25))	130	0	87	0	217
Mississippi River (Alton, IL (L26))	261	0	130	0	391
Mississippi River (Granite City, IL (L27))	259	0	132	0	391
Illinois River (La Grange)	84	0	59	0	143
Ohio River (Olmsted)	55	0	41	0	96
Arkansas River (L1)	0	11	7	0	18
Weekly total - 2026	314	11	179	0	505
Weekly total - 2025	378	0	185	0	562
2026 YTD	3,844	243	2,878	28	6,992
2025 YTD	4,665	265	3,380	75	8,386
2026 as % of 2025 YTD	82	92	85	37	83
Last 4 weeks as % of 2025	105	142	98	8	103
Total 2025	20,015	1,259	11,322	166	32,761

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

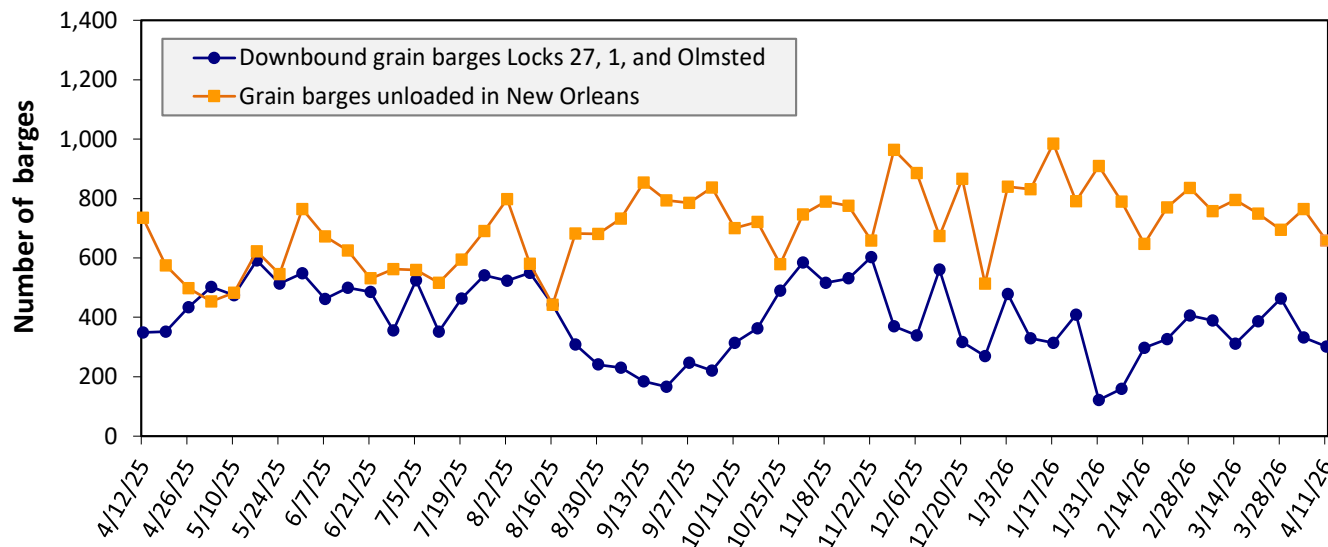
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending April 11: 687 barges transited the locks, 44 barges fewer than the previous week, and 6 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 11: 302 barges moved down river, 30 fewer than the previous week; 658 grain barges unloaded in the New Orleans Region, 14 percent fewer than the previous week.

Note: Olmsted = Olmsted Locks and Dam.

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

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

River	Origin	\$/ton			Current month % change from the same month	
		April 2026	March 2026	April 2025	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$22.63	\$22.16	\$21.57	4.9	7.6
	Central Ferry, WA/Almota, WA	\$21.70	\$21.23	\$20.67	5.0	7.6
	Lyons Ferry, WA	\$20.65	\$20.18	\$19.66	5.0	7.5
	Windust, WA/Lower Monumental, WA	\$19.58	\$19.11	\$18.63	5.1	7.4
	Sheffler, WA	\$19.55	\$19.08	\$18.60	5.1	7.5
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$18.31	\$17.84	\$17.40	5.2	7.4
	Port Kelly, WA/Wallula, WA	\$18.08	\$17.61	\$17.18	5.2	7.4
	Umatilla, OR	\$17.98	\$17.51	\$17.08	5.3	7.4
	Boardman, OR/Hogue Warner, OR	\$17.71	\$17.24	\$16.82	5.3	7.4
	Arlington, OR/Roosevelt, WA	\$17.55	\$17.08	\$16.66	5.3	7.4
	Biggs, OR	\$16.17	\$15.70	\$15.33	5.5	7.3
	The Dalles, OR	\$15.03	\$14.56	\$14.23	5.6	7.2

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

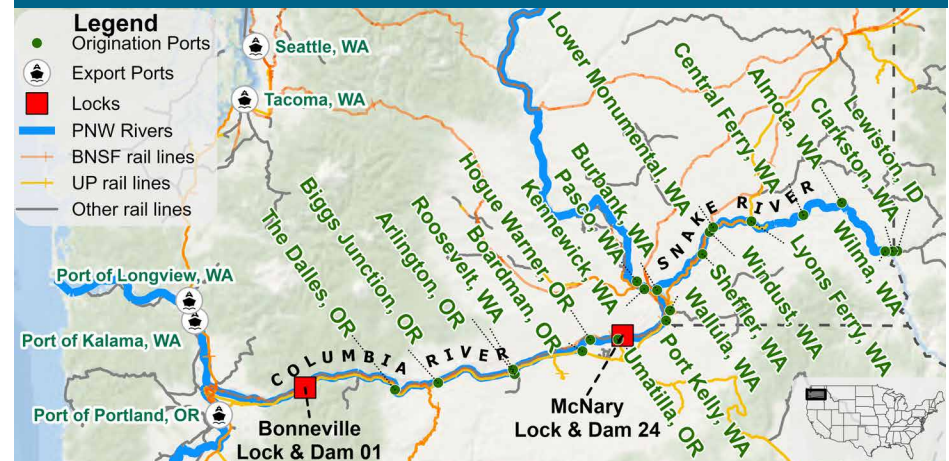
Table 12. Monthly barged grain movements, Columbia-Snake (1,000 tons)

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

Note: "Other" refers to corn, soybeans, oats, barley, and rye. Totals may not add up because of rounding. "Monthly total" refers to grain moving through Lock 1, headed for export.
YTD = year to date. "L" (as in "L1") refers to lock, locks, or lock and dam facility.
n/a = data not available.

Source: U.S. Army Corps of Engineers.

Figure 15. Dam and port locations on Columbia-Snake River



Source: USDA, Agricultural Marketing Service.

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

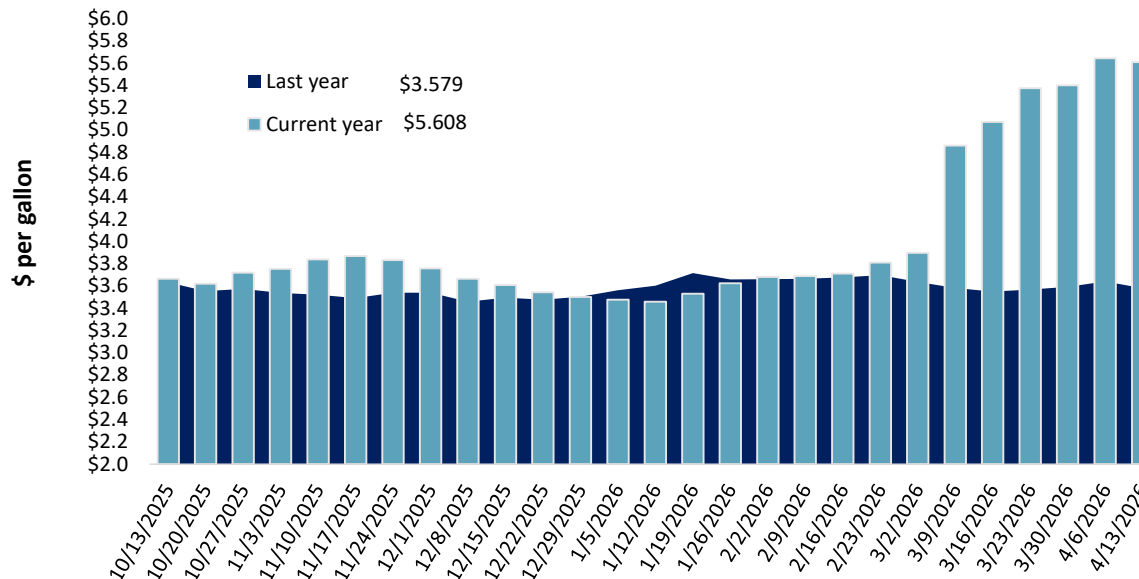
Table 13. Retail on-highway diesel prices, week ending 4/13/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	5.674	-0.066	2.014
	New England	6.024	0.027	2.062
	Central Atlantic	5.996	0.016	2.140
	Lower Atlantic	5.518	-0.106	1.962
II	Midwest	5.382	0.078	1.872
III	Gulf Coast	5.310	-0.105	2.043
IV	Rocky Mountain	5.256	-0.156	1.776
V	West Coast	6.822	-0.102	2.541
	West Coast less California	6.183	-0.153	2.350
	California	7.559	-0.008	2.762
Total	United States	5.608	-0.035	2.029

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 13, the U.S. average diesel fuel price decreased 3.5 cents from the previous week to \$5.608 per gallon, 202.9 cents above the same week last year.

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

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

Grain Exports		Wheat						Corn	Soybeans	Total
		Hard red winter (HRW)	Soft red winter (SRW)	Hard red spring (HRS)	Soft white wheat (SWW)	Durum	All wheat			
Current unshipped (outstanding) export sales	For the week ending 4/9/2026	1,150	474	1,108	995	112	3,839	22,267	6,819	32,924
	This week year ago	1,223	387	1,082	1,066	71	3,829	18,176	4,512	26,518
	Last 4 wks. as % of same period 2024/25	103	145	114	94	170	109	126	166	130
Current shipped (cumulative) exports sales	2025/26 YTD	7,485	2,827	5,274	4,453	496	20,535	50,520	31,334	102,390
	2024/25YTD	4,226	2,733	5,649	4,690	286	17,584	38,405	42,126	98,115
	YTD 2025/26 as % of 2024/25	177	103	93	95	174	117	132	74	104
	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 4/9/2026	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	21,374	19,684	9	19,839
Japan	12,507	9,463	32	10,478
Colombia	6,032	5,794	4	5,493
China	0	33	-100	3,461
Korea	7,205	4,169	73	3,127
Top 5 importers	39,913	34,973	14	39,272
Total U.S. corn export sales	72,787	56,222	29	54,276
% of YTD current month's export projection	87%	77%	-	-
Change from prior week	1,401	1,562	-	-
Top 5 importers' share of U.S. corn export sales	55%	62%	-	72%
USDA forecast April 2026	83,824	72,597	15	-
Corn use for ethanol USDA forecast, April 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 4/9/2026	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	11,524	22,336	-48	26,078
Mexico	4,615	4,372	6	4,762
Japan	1,826	1,683	8	2,107
Egypt	4,331	2,758	57	2,098
Indonesia	1,862	1,470	27	1,997
Top 5 importers	24,158	32,620	-26	37,042
Total U.S. soybean export sales	38,153	46,272	-18	48,941
% of YTD current month's export projection	91%	90%	-	-
Change from prior week	248	485	-	-
Top 5 importers' share of U.S. soybean export sales	63%	70%	-	76%
USDA forecast, April 2026	41,912	51,220	-18	-

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 4/9/2026	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	4,481	3,984	12	3,358
Philippines	2,893	2,597	11	2,473
Japan	2,183	2,109	4	2,045
China	336	139	142	1,137
Korea	1,878	2,395	-22	1,674
Taiwan	976	1,012	-4	935
Thailand	658	891	-26	667
Nigeria	1,511	682	121	629
Indonesia	1,087	754	44	518
Colombia	723	473	53	489
Top 10 importers	16,726	15,037	11	13,926
Total U.S. wheat export sales	24,374	21,281	15	19,135
% of YTD current month's export projection	100%	95%	-	-
Change from prior week	100	76	-	-
Top 10 importers' share of U.S. wheat export sales	69%	71%	-	73%
USDA forecast, April 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)

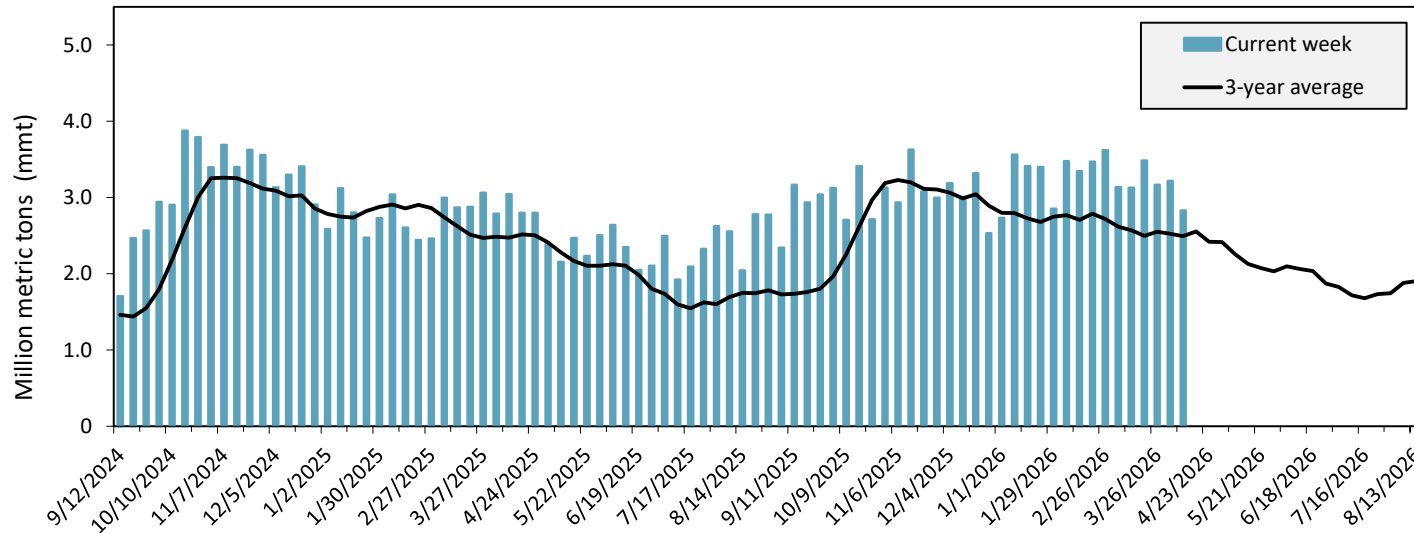
Port regions	Commodity	For the week ending 04/09/2026	Previous week*	Current week as % of previous	2026 YTD*	2025 YTD*	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	474	485	98	7,036	6,919	102	90	125	24,214
	Soybeans	68	270	25	3,043	1,724	177	183	373	2,957
	Wheat	137	113	121	2,689	2,834	95	64	66	12,271
	All grain	679	868	78	12,768	11,566	110	94	121	39,721
Mississippi Gulf	Corn	824	1,078	76	10,793	10,471	103	116	139	37,115
	Soybeans	560	235	238	9,092	8,311	109	91	99	23,350
	Wheat	42	62	67	907	1,022	89	78	80	3,980
	All grain	1,425	1,376	104	20,792	19,804	105	104	118	64,484
Texas Gulf	Corn	55	22	251	431	105	411	n/a	671	590
	Soybeans	0	0	n/a	100	106	94	63	190	1,431
	Wheat	28	109	26	1,234	845	146	85	128	4,690
	All grain	283	188	150	4,024	1,141	353	254	257	7,774
Interior	Corn	224	420	53	4,389	3,396	129	100	119	15,546
	Soybeans	96	185	52	2,023	1,870	108	106	112	7,712
	Wheat	64	55	117	824	805	102	97	117	3,104
	All grain	402	661	61	7,359	6,193	119	99	116	26,887
Great Lakes	Corn	0	23	0	23	0	n/a	n/a	n/a	414
	Soybeans	0	0	n/a	0	0	n/a	n/a	0	63
	Wheat	0	0	n/a	22	33	67	101	62	434
	All grain	0	23	0	45	33	136	308	126	911
Atlantic	Corn	33	0	n/a	499	121	413	523	924	607
	Soybeans	8	102	8	348	420	83	770	238	1,085
	Wheat	0	0	n/a	0	0	n/a	n/a	0	81
	All grain	41	102	40	847	541	157	594	433	1,773
All Regions	Corn	1,610	2,028	79	23,170	21,012	110	109	136	78,486
	Soybeans	731	793	92	15,011	12,535	120	111	127	36,851
	Wheat	271	339	80	5,676	5,538	102	76	85	24,560
	All grain	2,829	3,219	88	46,240	39,382	117	108	127	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.

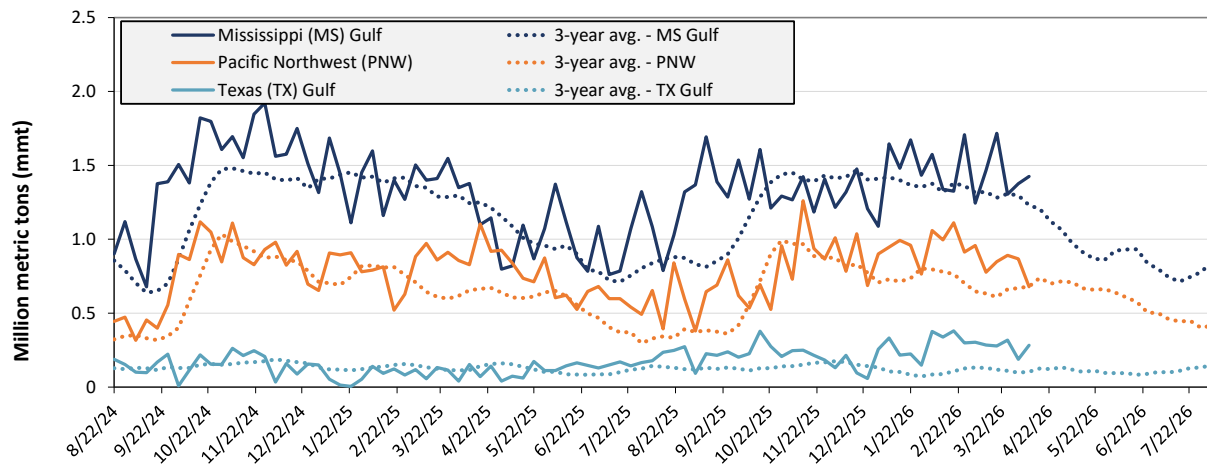
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending April 09: 2.8 mmt of grain inspected, down 12 percent from the previous week, down 4 percent from the same week last year, and up 13 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 04/09/26 inspections (mmt):

MS Gulf: 1.43

PNW: 0.68

TX Gulf: 0.28

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 4	up 50	up 9	down 22
Last year (same 7 days)	up 5	up 147	up 16	down 17
3-year average (4-week moving average)	up 16	up 172	up 28	un changed

Source: USDA, Federal Grain Inspection Service.

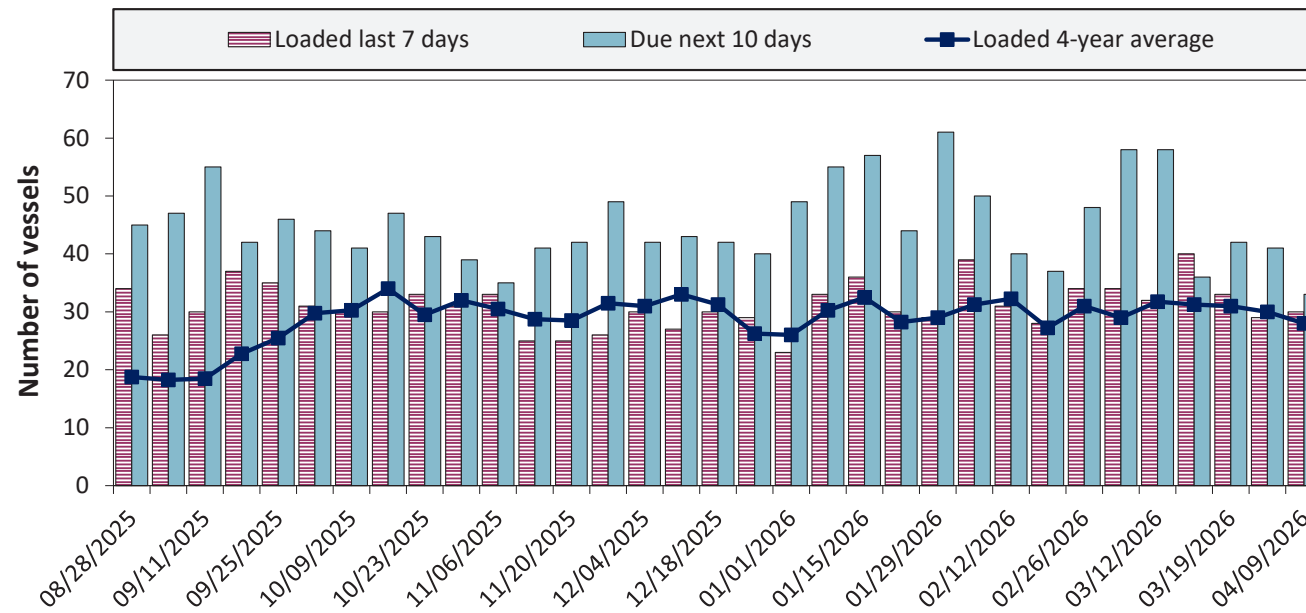
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
4/9/2026	20	30	33	15
4/2/2026	27	29	41	12
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

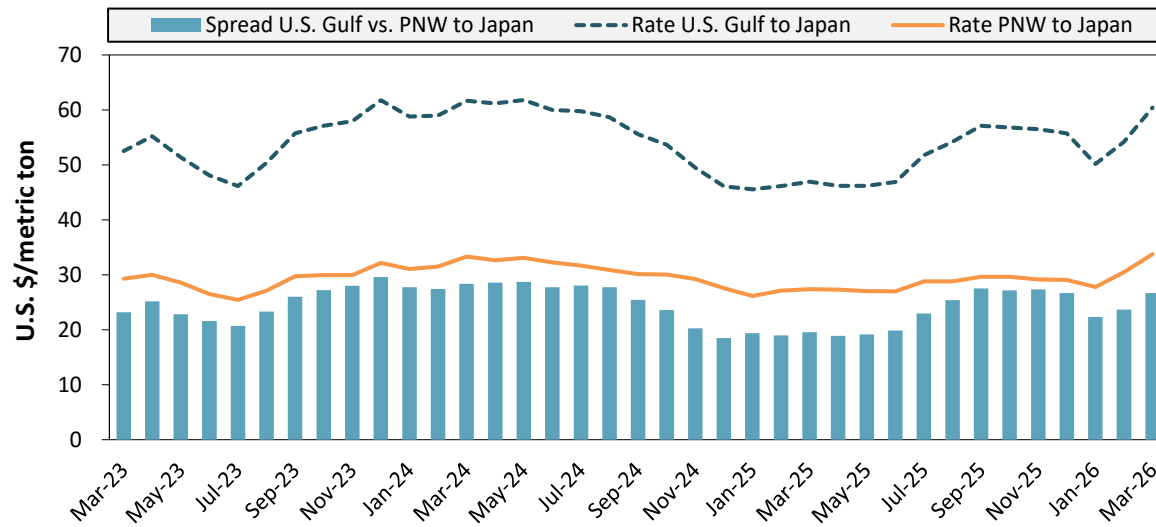


Week ending 04/09/26, number of vessels	Loaded	Due
Change from last year	-9%	-38%
Change from 4-year average	7%	-28%

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 04/11/2026

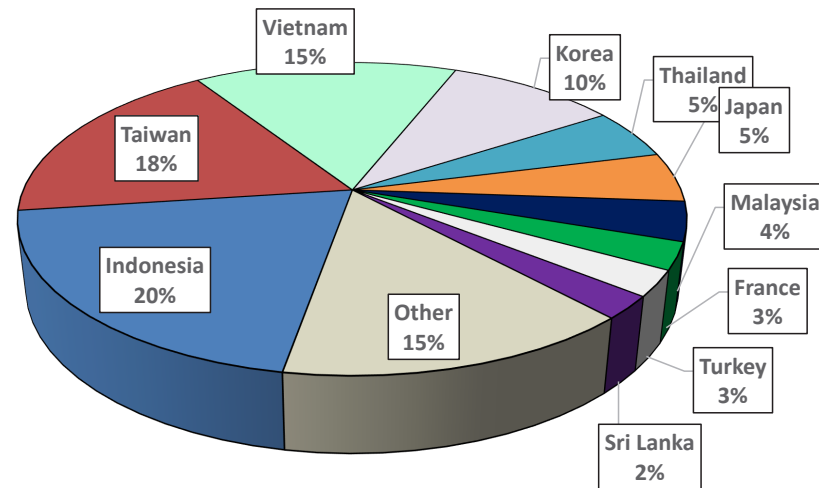
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Colombia	Soybean Meal	Mar 24, 2026	May 1/10, 2026	50,000	31.60
PNW	Bangladesh	Soybeans	Mar 11, 2026	May 1/10, 2026	48,400	57.31
PNW	S. Korea	Heavy grain	Mar 12, 2026	May 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.

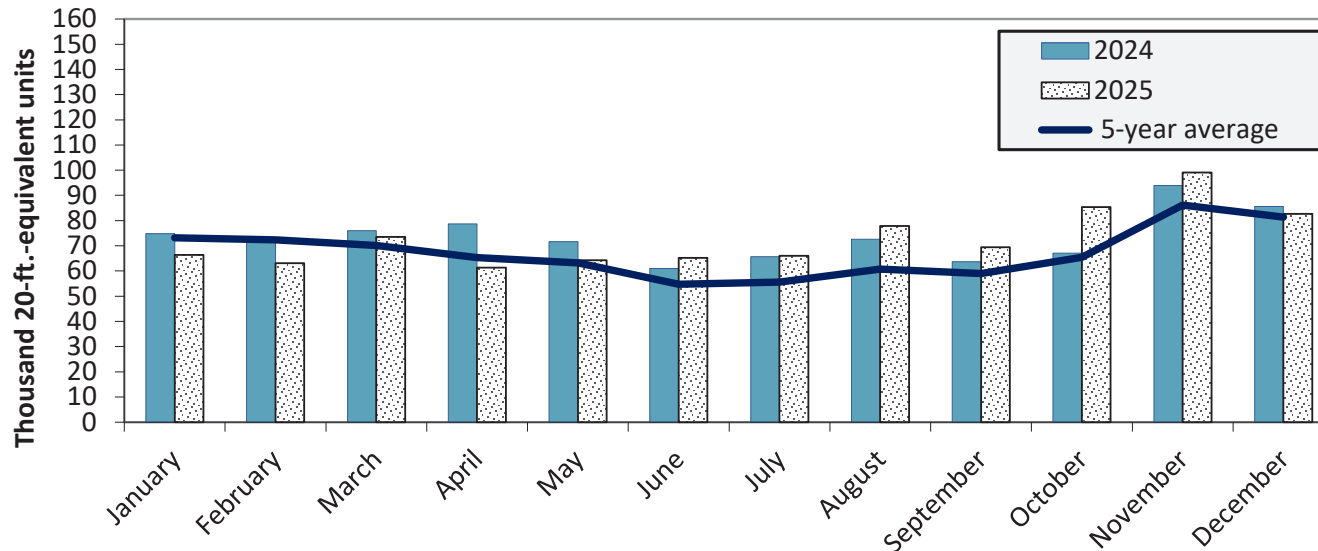
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Dec 2025



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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