



Grain Transportation Report

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Diesel Price Falls for 2 Consecutive Weeks.

According to the U.S. Energy Information Administration (EIA), for the week ending April 20, the U.S. average diesel fuel price was \$5.403 per gallon—down 20.5 cents from the previous week and up 186.9 cents from the same week last year. The most recent week's decline was also the largest since the 21.3-cent drop of December 12, 2022. Over the last 2 weeks, after rising for 12 consecutive weeks, the U.S. average diesel price dropped a total of 24 cents.

According to EIA's April [Short-Term Energy Outlook](#), EIA projects the Brent crude oil price will average \$115 per barrel in second quarter 2026 before easing, as caps on production slowly subside in 2026. The Brent crude oil price is projected to average \$96 per barrel in 2026, 39 percent above 2025 and up \$17 per barrel from EIA's March forecast.

EIA also projects diesel prices to average \$4.80 per gallon in 2026, up 114 cents from the 2025 average price of \$3.66 per gallon and up 68 cents per gallon from EIA's March forecast. EIA says higher diesel prices have resulted from higher crude oil prices, tight global diesel supplies, and U.S. diesel inventories below the 5-year average.

STB Approves Norfolk Southern's Control of Virginia Switching Railroad.

On April 6, the Surface Transportation Board (STB) [approved](#) Norfolk Southern Railway's (NS) application to control the Norfolk & Portsmouth Belt Line Railroad (NPBL)—a 36-mile terminal switching railroad that serves the Port of Virginia.

Despite holding a majority stake in NPBL since 1982, NS did not formally receive regulatory approval for control of NPBL until now. CSX

Transportation (CSX), which owns a minority stake in NPBL, opposed NS's control of the switching railroad: CSX alleged that NS and NPBL set a switching rate that limited CSX's ability to reach the Virginia Port Authority's Norfolk International Terminal (one of the largest intermodal terminals in the East Coast). In an April 6 decision, STB approved NS's control of NPBL, provided that NPBL remains a "neutral switching carrier operated on a uniform, cost-plus basis."

In 2025, the Port of Virginia handled 2.4 million metric tons of containerized grain exports—up 5 percent from the prior 5-year average. NPBL also serves Perdue AgriBusiness's Chesapeake, VA, export terminal—the only deepwater bulk grain terminal on the East Coast.

BNSF Holds First Auction for Yearlong Direct DETs.

On April 14, BNSF Railway (BNSF) held its first auction for five yearlong Direct Destination Efficiency Trains ("Direct DETs"). The contracts will run from August 2026 to August 2027. Yearlong Direct DETs are a new offering that BNSF has introduced for crop year 2026/27 ([Grain Transportation Report \(GTR\), March 26, 2026, fourth highlight](#)).

In the April 14 auction, BNSF sold the five 1-year Direct DET contracts (beginning in August) for a combined total of \$3.1 million. Ranging from \$451,000 to \$754,000, winning bids averaged \$624,000.

On April 21, BNSF held an auction for 17 (regular, 4-month commitment) Direct DETs—all beginning in August. BNSF sold the 17 Direct DET contracts for \$4.5 million. Ranging from \$261,000 to \$268,000, winning bids averaged \$265,000.

FMC Hears Agriculture's Views on Ocean Carriers' Chassis Practices.

Responding to a Federal Maritime Commission (FMC) request, agricultural and other stakeholders recently [commented](#) on whether ocean carriers' practices restrict truckers' and shippers' ability to choose chassis providers ([GTR, February 12, 2026, third highlight](#)).

Agricultural interests emphasized that artificial shortages, delays, and added costs are created by "box rules" (i.e., requirements that a specific container must be paired with a specific chassis provider). These constraints, they argued, increase risks to product quality and can ultimately lead to reputational damage (to shippers) and lost sales in competitive export markets. Similarly, trucking interests said box rules and carrier-designated chassis pools restrict truckers' choice and contribute to inefficiencies at ports and inland rail ramps.

On the other hand, the Ocean Carrier Equipment Management Association maintained that trucker-owned and leased chassis now dominate many markets, reducing the practical relevance of carrier chassis designations. Plus, the group said, some cooperative chassis pools have shrunk or ceased operations.

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 16, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2025/26 totaled 31.49 million metric tons (mmt), down 4 percent from last week and up 26 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26 were 1.32 mmt, down 6 percent from last week. Net [soybean export sales](#) were 0.37 mmt, up 47 percent from last week. Net [wheat export sales](#) were 0.13 mmt, up 29 percent from last week.

Rail

U.S. Class I railroads originated 28,523 [grain carloads](#) during the week ending April 11. This was a 7-percent decrease from the previous week, 1 percent more than last year, and 15 percent more than the 3-year average.

Average April [shuttle secondary railcar bids/offers](#) (per car) were \$875 above tariff for the week ending April 16. This was \$433 more than last week and \$988 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$63 above tariff. This was \$25 less than last week and \$238 lower than this week last year.

Barge

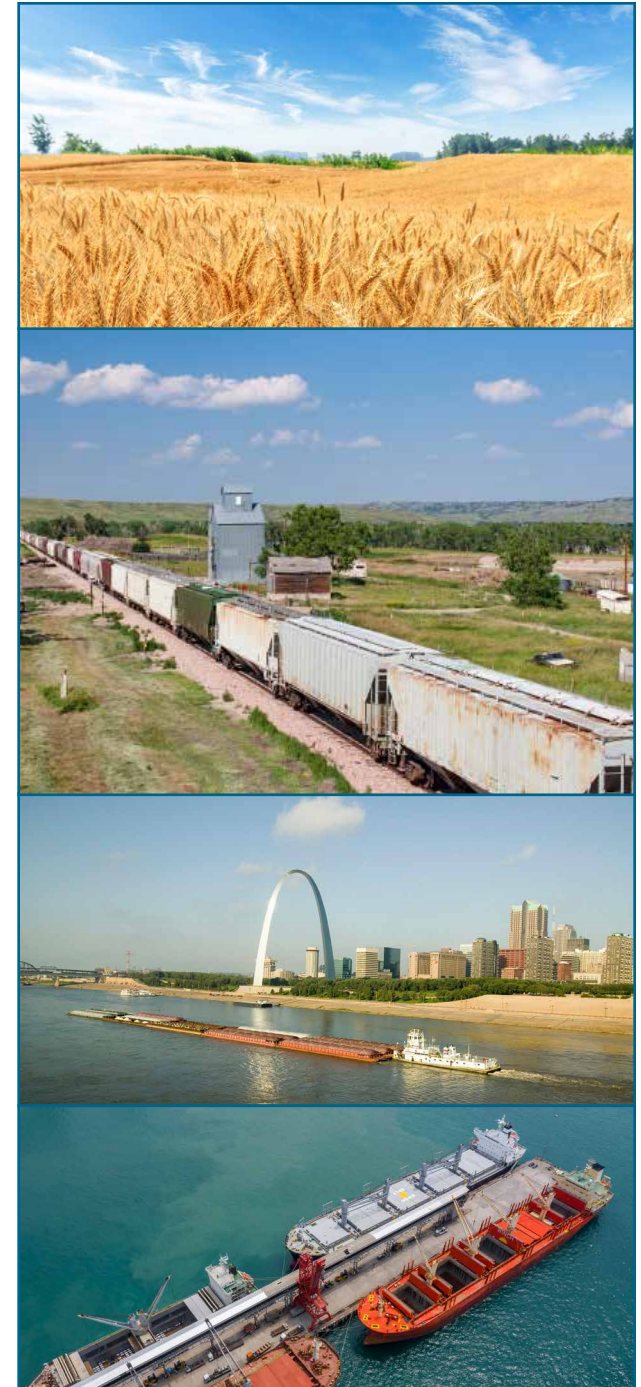
For the week ending April 18, [barged grain movements](#) totaled 719,627 tons. This was 43 percent more than the previous week and 53 percent more than the same week last year.

For the week ending April 18, 475 [barges moved down river](#), 173 more than the previous week. There were 614 grain barges unloaded in the New Orleans region, 7 percent less than the previous week.

Ocean

For the week ending April 16, 27 [oceangoing grain vessels](#) were loaded in the Gulf—21 percent fewer than the same period last year. Within the next 10 days (starting April 17), 40 vessels were expected to be loaded—21 percent more than the same period last year.

As of April 16, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$67.25, up 4 percent from the previous week. The rate from the Pacific Northwest to Japan was \$35.50 per mt, up 2 percent from the previous week.



March Surge Pushed First Quarter Bulk Ocean Freight Rates Above a Year Ago

In a typical first quarter of the year, various holidays around the world cause a seasonal dip in demand for bulk shipping and declining ocean freight rates. However, first quarter 2026 slightly diverged from the norm. From fourth quarter 2025 to first quarter 2026 (quarter to quarter), ocean freight rates for shipping bulk commodities (including grain) varied by origin—rising for routes from the Pacific Northwest (PNW routes) and falling for routes from the U.S. Gulf (Gulf routes). For all routes, rates lagged the prior 4-year average, but exceeded rates of first quarter 2025 (a year prior).¹

In first quarter 2026, ocean freight rates for shipping bulk grain (wheat, corn, and soybeans) from the U.S. Gulf to Japan averaged \$54.93 per metric ton (mt). This rate was down 3 percent quarter to quarter, up 19 percent year to year, and 3 percent below average (table 1 and fig. 1).

From the U.S. Gulf to Europe, rates averaged \$22.98 per mt—down 8 percent quarter to quarter, up 2 percent year to year, and 12 percent below average. From the Pacific Northwest (PNW) to Japan, rates averaged \$30.68 per mt—up 5 percent quarter to quarter, up 14 percent year to year, and 2 percent below average.

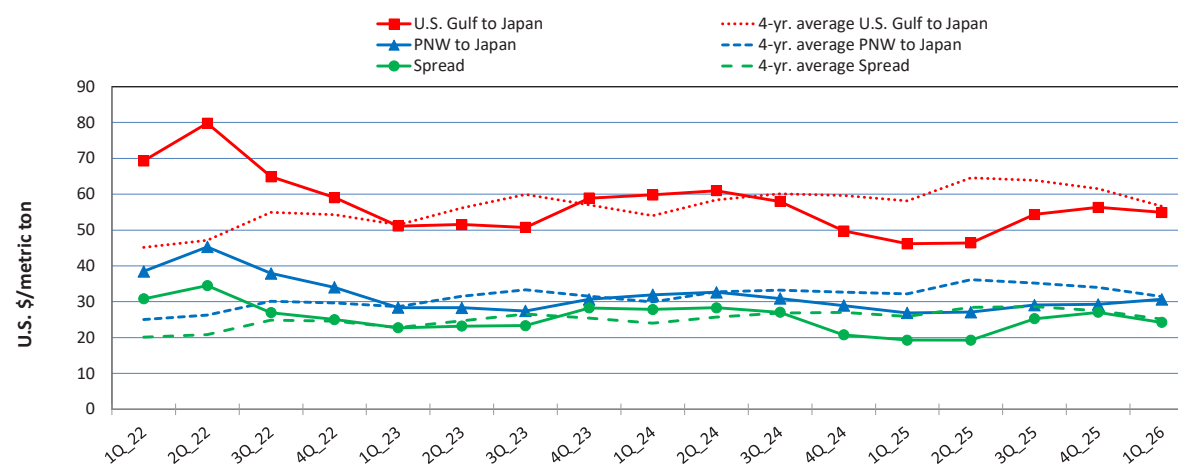
Table 1. Ocean freight rates for grain routes during first quarter 2026

Route	Jan.	Feb.	Mar.	1st qtr. 2026	Change from		
					4th qtr. '25	1st qtr. '25	4-yr. avg.
	--\$/mt--			--\$/mt--	Percent		
U.S. Gulf to Japan	50.15	54.19	60.44	54.93	-3	19	-3
PNW to Japan	27.80	30.50	33.75	30.68	5	14	-2
Spread	22.35	23.69	26.69	24.24	-10	25	-4
U.S. Gulf to Europe	23.00	22.63	23.31	22.98	-8	2	-12

Note: qtr. = quarter; avg. = average; mt = metric ton; yr. = year; PNW = Pacific Northwest.

Source: O'Neil Commodity Consulting/World Perspectives, Inc..

Figure 1. Grain vessel rates and spread, United States to Japan, 2020-25



Note: Q = quarter; yr. = year; PNW = Pacific Northwest.

Source: O'Neil Commodity Consulting.

¹ Unless otherwise noted, “average” refers the prior-4-year average for the first quarter.

This article examines monthly rate changes during the first quarter, as well as current rates and possible future trends.

Monthly Changes in Rates

January. After falling continuously from late October to early January, ocean freight rates trended up in response to higher grain demand, particularly from Brazil and Argentina ([GTR fig. 20](#)). Strong movements of iron ore and bauxite helped further cushion the usual lull in demand from the pre-Lunar Year holidays. China continued to build up its iron ore inventories, which were at record highs for January and just 5 million metric tons (mmt) below the 2018 all-time highs (Transportation and Export Report, World Perspectives, Inc., January 21, 2026).

February. Because of strong cargo demand, ocean freight rates defied the usual late-January/early-February declines and continued to rise amid accelerated demand for grain from the United States and South America.

Also, in January and February combined, China [imported](#) 210 mmt of iron ore—10 percent more than during the same 2025 period. The year-to-year increase was driven by strong domestic demand for restocking fed primarily by imports from Australia. (The robustness of iron ore imports was due

in part to fewer weather-related disruptions in Australia than in the previous year). From January to February, China's demand for iron ore and coal increased. Further spurring ocean freight rates, a vessel shortage confronted charterers, who were frontloading petcoke and grain as the Brazilian harvest was ramping up (Transportation and Export Report, World Perspectives, Inc., February 12, 2026)

March. From February to March, ocean freight rates continued their rise, with several driving factors: a reviving demand for dry bulk shipping after the Chinese New Year holidays; steady or improved cargo flow from Indonesia and Australia; and increased demand for grain (both from the United States and the East Coast of South America—primarily Brazil and Argentina).

Rising bunker fuel prices amid the Middle East conflict also put upward pressure on ocean freight rates. On March 20, the Global 20 Ports' average price of very low sulfur fuel oil (VLSFO) (typical fuel used by ship operators) was \$1,053 per metric ton (mt)—its highest since July 5, 2022 (\$1,081 per metric ton) and a 92-percent rise from a year earlier.² Also, as of March 19, intermediate fuel oil 380 (IFO 380), the second-most-used bunker fuel, reached an all-time high of \$916 per mt—up 87 percent from a year earlier.

Current Market Analysis and Outlook

For the week ending April 16, the rate for shipping 1 mt of grain from the U.S. Gulf to Japan was \$67.00—34 percent more than the first available rate at the beginning of the year and 48 percent more than for the same week in 2025. The rate from the PNW to Japan was \$35.50 per mt—34 percent more than the first available rate at the beginning of the year and 33 percent more than the same week in 2025.

Potential Downward Pressures on Rates. Some [market analysts](#) noted China's recent surge in iron ore imports was driven by a government [policy](#) imposing an export quota for steel and related products. Steelmakers were ramping up output and exports in anticipation of restrictions, driving a surge in raw material imports. According to these analysts, the surge in iron ore imports masked a growing weakness in China's domestic steel market (driven by an ongoing downturn in the property sector): thus, the surge was not sustainable.

China's finished steel exports also weakened, down 8.1 percent in January and February from the same months in 2025. Given China's status as a major global importer, its softened demand for imported goods can significantly affect ocean freight rates.

²The "Global 20 Ports Average," for VLSO, is the linear average of the following 20 major global bunkering ports that together account for a significant share of global volumes: Busan, Colombo, Durban, Fujairah, Gibraltar, Hong Kong, Houston, Istanbul, LA/Long Beach, Las Palmas, Mumbai, New York, Panama, Piraeus, Rotterdam, Santos, Shanghai, Singapore, St Petersburg, Tokyo.

Typically, ocean freight rates fall when available vessel capacity is ample, and in March, the global dry bulk fleet's operating capacity was ample—estimated at 1,072.8 million deadweight tons (mdwt), up 14 percent from 943.4 mdwt in December 2021 (table 2). Also, year to date as of March 31, 1.05 mdwt capacity had been demolished.

Potential Upward Pressures on Rates.

Some market analysts predict that many countries—including the European Union, Japan, South Korea, China, and Taiwan—are transitioning from liquefied natural gas (LNG) to other fuels. (Coal is expected to play a bigger role.) This shift toward fuels with steadier pricing than LNG is expected to support dry bulk demand, particularly from Indonesia to other Southeast Asia destinations, which in

turn, could put upward pressure on ocean freight rates (*Transportation and Export Report*, World Perspectives, Inc., March 26, 2026).

According to Drewry, Indonesia plans to expand agricultural imports (wheat, soybeans, and soybean meal) from the United States. The potential shift in global trade flows would increase long-haul voyages and increase demand for vessels such as Panamaxs and Supramaxes, exerting additional upward pressure on rates (*Shipping Insight*, Drewry Maritime Research (Drewry), April 7, 2026).

Places of Uncertainty. The Middle East conflict may continue to impact the ocean shipping and energy sectors. The conflict has caused some vessels, especially container vessels, to be **diverted** from the Strait of Hormuz and created new transshipment hubs

across Asia. In addition, the conflict has elevated bunker fuel prices to the levels last seen in 2022, when the Russia-Ukraine War started.

Following a U.S.-China agreement in November 2025, the Office of the United States Trade Representative **suspended**, until November 2026, its Section 301 fees on Chinese-built, -owned or -operated vessels. However, the fees, scheduled to take effect in November, **will not apply to** Chinese-built vessels with non-Chinese operators, as long as the ships arrive empty at a U.S. port or have capacity below 80,000 dwt. Analysts are uncertain how the fees will affect the bulk market and, consequently, ocean freight rates.

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Table 2: Global dry bulk operating fleet, December 2021-25, March 2026

Type of vessel		Size (dwt)	2021		2022		2023		2024		2025		As of March 2026	
			No. of vessels	Capacity mdwt	No. of vessels	Capacity mdwt	No. of vessels	Capacity mdwt	No. of vessels	Capacity mdwt	No. of vessels	Capacity mdwt	No. of vessels	Capacity mdwt
Handysize	Small Handy	10,000-24,999	1,226	21.0	1,344	22.9	1,436	24.3	1,554	26.1	1,684	28.0	1,693	28.1
	Mid-size Handy	25,000-34,999	1,552	48.0	1,560	48.2	1,566	48.4	1,569	48.5	1,555	48.1	1,553	48.1
	Large Handy	35,000-39,999	1,010	37.9	1,036	38.9	1,063	39.9	1,090	41	1,099	48.1	1,109	41.7
	Cement Carrier	Cement capable	88	1.4	87	1.4	84	1.3	84	1.3	86	1.3	85	1.3
Supramax	Handymax	40,000-49,999	684	31.5	724	33.2	735	33.6	817	36.9	908	40.5	923	41.0
	Traditional Supramax	50,000-59,999	2,092	116.2	2,108	117.0	2,137	118.7	2,152	119.5	2,147	119.2	2,149	119.4
	Ultramax	60,000-69,999	1,116	69.9	1,198	75.0	1,300	81.5	1,439	90.4	1,601	100.8	1,653	104.2
Panamax	Traditional Panamax	60,000-69,999	1,154	85.6	1,165	86.4	1,158	85.8	1,172	86.8	1,178	87.2	1,175	87.0
	Post Panamax	79,000-99,000	537	48.9	580	52.5	615	55.5	630	56.8	651	58.6	652	58.7
	Kamsarmax	79,000-99,000	1,306	106.6	1,368	111.7	1,451	118.6	1,529	125.0	1,623	132.7	1,661	135.9
Capesize/ VLOC	Mini Capesize	100,000-129,999	153	17.1	155	17.4	160	17.9	160	17.9	158	17.7	156	17.5
	Standard Capesize	130,000-199,000	1,091	194.2	1,091	194.4	1,113	198.5	1,119	199.7	1,126	201	1,129	201.6
	Large Capesize	200,000+	412	86.3	435	91.2	462	96.8	489	102.5	513	107.6	516	108.2
	Vloc	200,000+	254	78.8	259	80.4	259	80.4	259	80.4	258	80.1	258	80.1
Total			12,675	943.4	13,110	970.6	13,539	1,001.4	14,063	1,032.9	14,587.0	1,064.3	14,712	1,072.8

Note: VLOC: Very large iron ore carrier.
Source: Drewry Shipping Consultants.

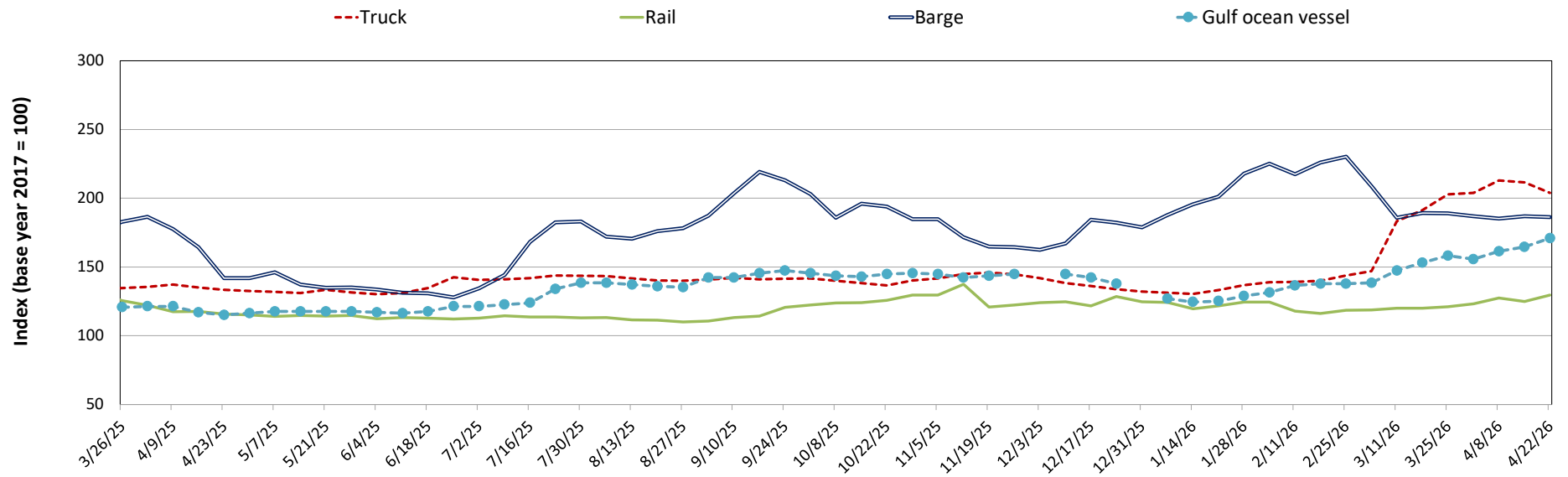
Grains are transported to the domestic and international markets via one or more of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
04/22/26	204	130	186	171	169
04/15/26	212	125	187	165	165
04/23/25	133	116	142	115	127

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.

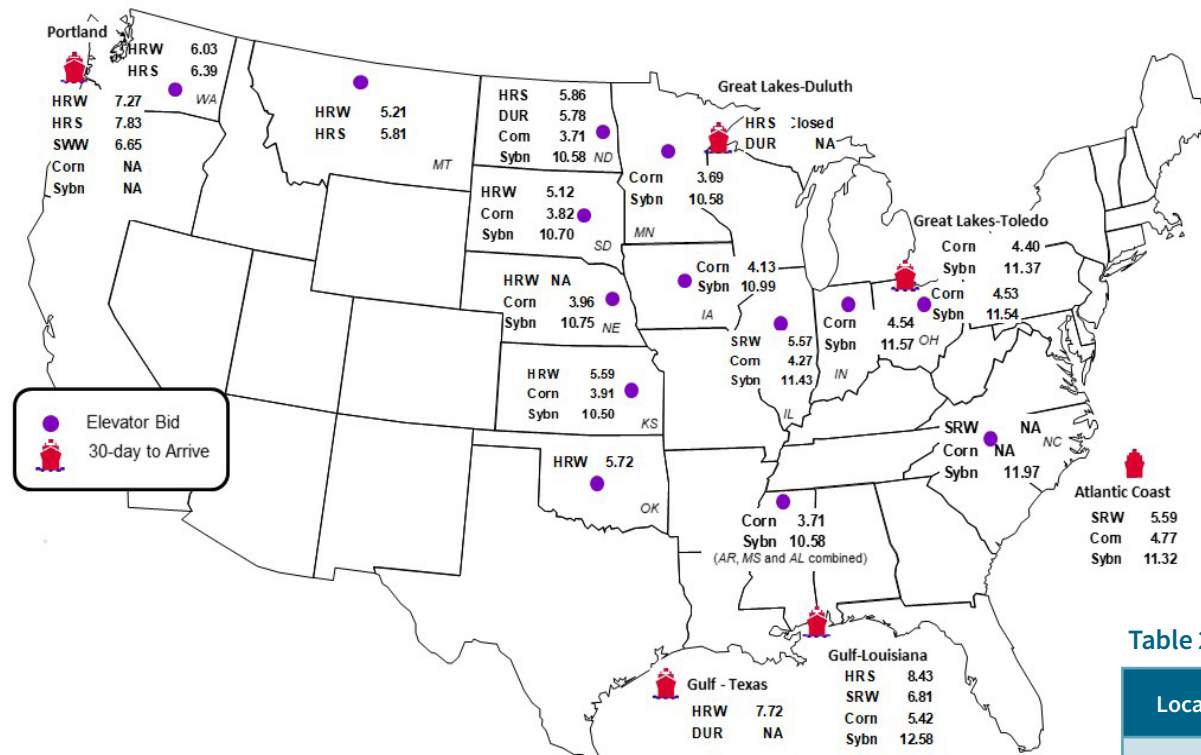
Figure 1. Grain transportation cost indicators as of week ending 4/22/26



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	4/17/2026	4/10/2026
Corn	IL-Gulf	-1.15	-1.14
Corn	NE-Gulf	-1.46	-1.45
Soybean	IA-Gulf	-1.59	-1.53
HRW	KS-Gulf	-2.13	-2.13
HRS	ND-Portland	-1.97	-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	4/17/2026	Week ago 4/10/2026	Year ago 4/18/2025
Kansas City	Wheat	May	6.500	5.908	5.744
Minneapolis	Wheat	May	6.533	6.115	6.062
Chicago	Wheat	May	5.992	5.710	5.646
Chicago	Corn	May	4.566	4.410	4.942
Chicago	Soybean	May	11.828	11.756	10.490

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.

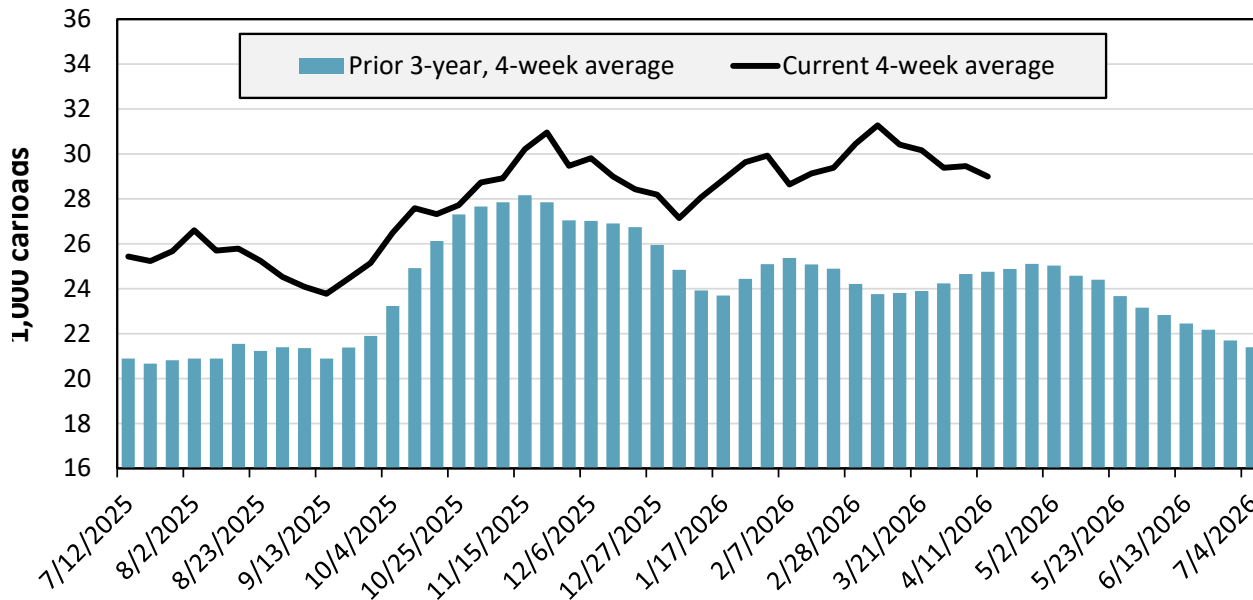
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 4/11/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,407	2,796	12,672	6,776	3,214	1,658	28,523
This week last year	1,676	3,288	12,734	6,421	3,337	807	28,263
2026 YTD	21,184	37,786	185,136	99,453	49,451	25,282	418,292
2025 YTD	25,263	42,905	164,230	85,726	37,649	20,382	376,155
2026 YTD as % of 2025 YTD	84	88	113	116	131	124	111
Last 4 weeks as % of 2025	98	92	104	107	118	121	106
Last 4 weeks as % of 3-yr. avg.	89	102	121	114	128	145	117
Total 2025	81,717	140,116	608,958	313,968	157,757	79,502	1,382,018

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

Source: Surface Transportation Board.

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



For the 4 weeks ending April 11, grain carloads were down 2 percent from the previous week, up 6 percent from last year, and up 17 percent from the 3-year average.

Source: Surface Transportation Board.

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

For the week ending: 4/10/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	16.6	31.7	32.3	18.0	17.1	17.2	22.1
	Average over last 4 weeks	31.8	29.1	29.5	18.5	12.8	18.5	23.3
	Average of same 4 weeks last year	50.1	30.9	21.3	15.8	7.2	n/a	25.1
Average grain unit train speeds (miles per hour)	This week	23.2	17.6	24.2	23.9	21.9	19.6	21.7
	Average over last 4 weeks	22.9	17.8	24.0	23.3	21.5	18.3	21.3
	Average of same 4 weeks last year	21.0	18.6	24.2	21.7	23.4	n/a	21.8

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

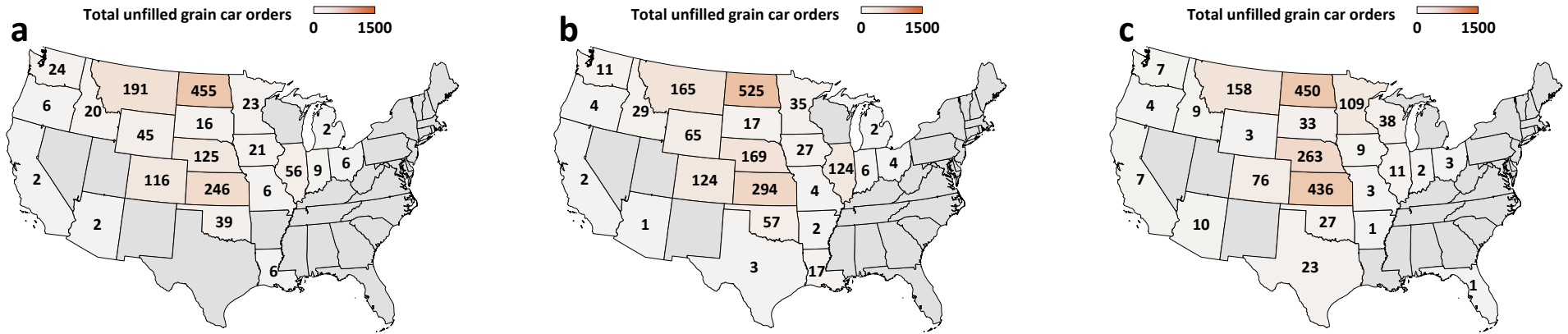
For the week ending: 4/10/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	47	28	427	43	7	209	760
	Average over last 4 weeks	52	20	426	52	17	326	894
	Average of same 4 weeks last year	73	9	306	99	11	n/a	498
Average number of loaded grain cars not moved in over 48 hours	This week	57	145	426	55	38	268	989
	Average over last 4 weeks	56	152	505	54	28	307	1,102
	Average of same 4 weeks last year	133	192	363	77	8	n/a	771
Average number of grain unit trains held	This week	0	1	10	2	2	2	17
	Average over last 4 weeks	0	1	8	3	1	5	18
	Average of same 4 weeks last year	1	0	13	6	0	n/a	20
Total unfilled manifest grain car orders	This week	36	0	710	485	0	285	1,516
	Average over last 4 weeks	23	7	818	610	0	254	1,712
	Average of same 4 weeks last year	8	5	390	768	0	n/a	1,171

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](#).

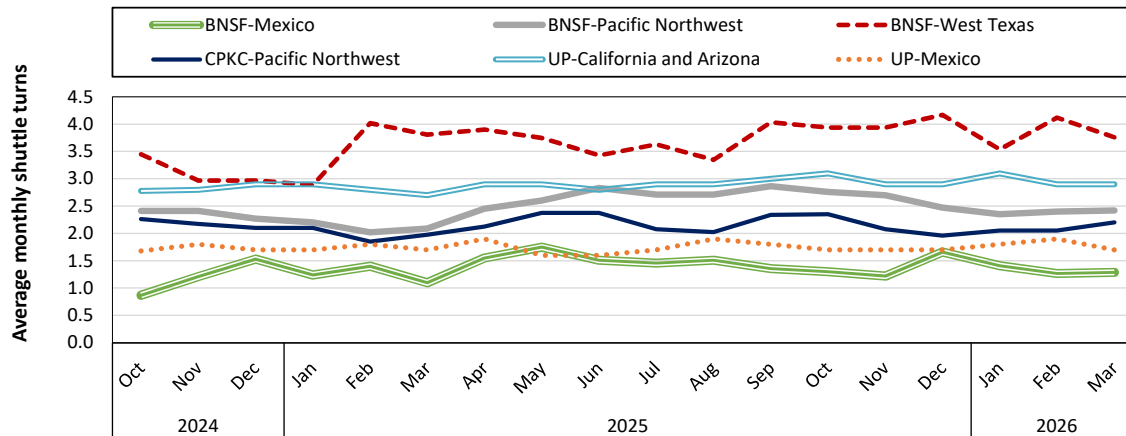
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 4/10/2026 (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

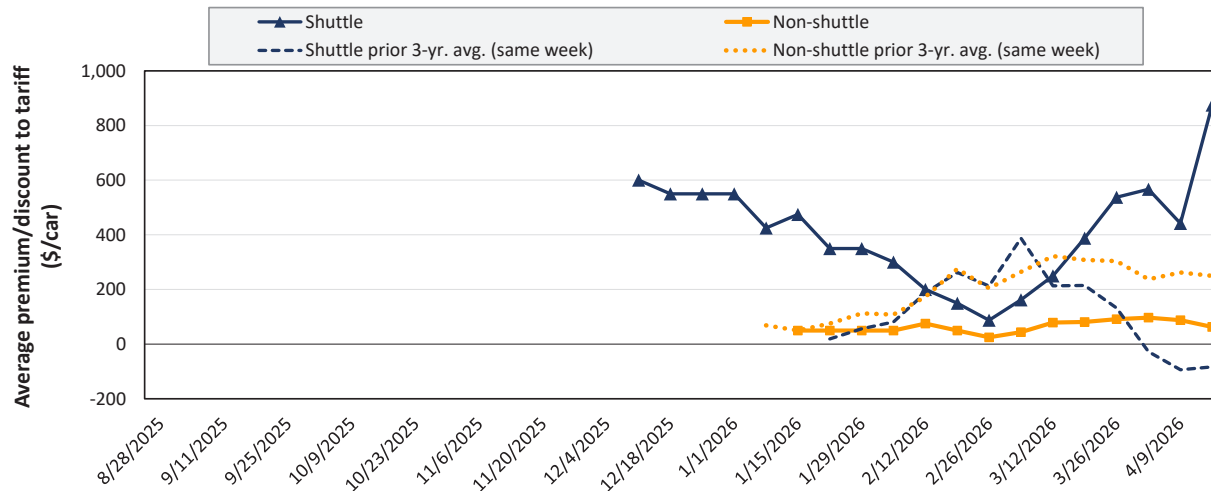


In March 2026, BNSF Railway's average monthly grain shuttle turns were 1.3 to Mexico, 2.4 to the Pacific Northwest, and 3.8 to West Texas. CPKC's shuttle turns averaged 2.2 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.7 to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



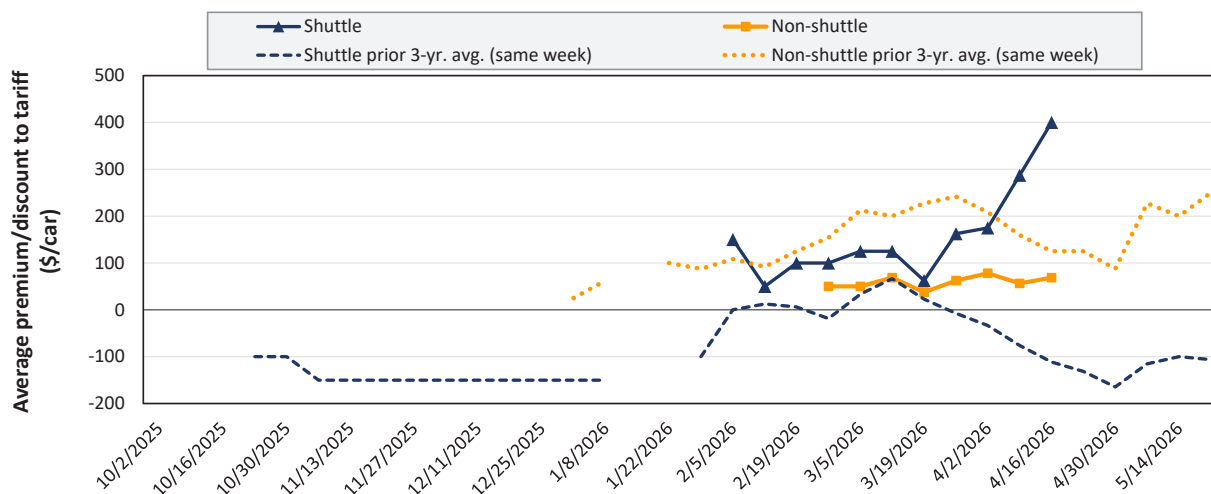
Average non-shuttle bids/offers fell \$25 this week, and are \$34 below the peak.

Average shuttle bids/offers rose \$433 this week and are at the peak.

4/16/2026	BNSF	UP
Non-Shuttle	\$63	n/a
Shuttle	\$1,300	\$450

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



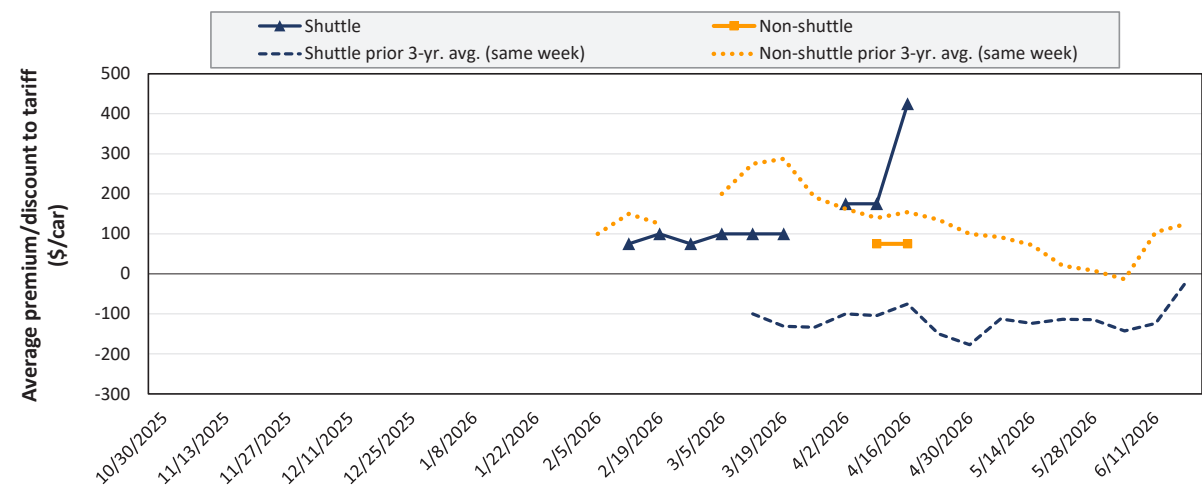
Average non-shuttle bids/offers rose \$13 this week, and are \$9 below the peak.

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

4/16/2026	BNSF	UP
Non-Shuttle	\$50	\$88
Shuttle	\$750	\$50

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



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

Average shuttle bids/offers rose \$250 this week and are at the peak.

4/16/2026	BNSF	UP
Non-Shuttle	\$50	\$100
Shuttle	\$425	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: 4/16/2026		Delivery period					
		Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26
Non-shuttle	BNSF	63	50	50	n/a	n/a	n/a
	Change from last week	-25	12	0	n/a	n/a	n/a
	Change from same week 2025	-238	-113	-50	n/a	n/a	n/a
	UP	n/a	88	100	n/a	n/a	n/a
	Change from last week	n/a	13	0	n/a	n/a	n/a
	Change from same week 2025	n/a	88	25	n/a	n/a	n/a
Shuttle	BNSF	1,300	750	425	150	-25	n/a
	Change from last week	650	375	250	100	n/a	n/a
	Change from same week 2025	1,300	700	n/a	n/a	n/a	n/a
	UP	450	50	n/a	n/a	n/a	n/a
	Change from last week	217	-150	n/a	n/a	n/a	n/a
	Change from same week 2025	675	250	n/a	n/a	n/a	n/a
	CPKC	n/a	100	100	n/a	n/a	n/a
	Change from last week	n/a	0	75	n/a	n/a	n/a
	Change from same week 2025	n/a	25	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.

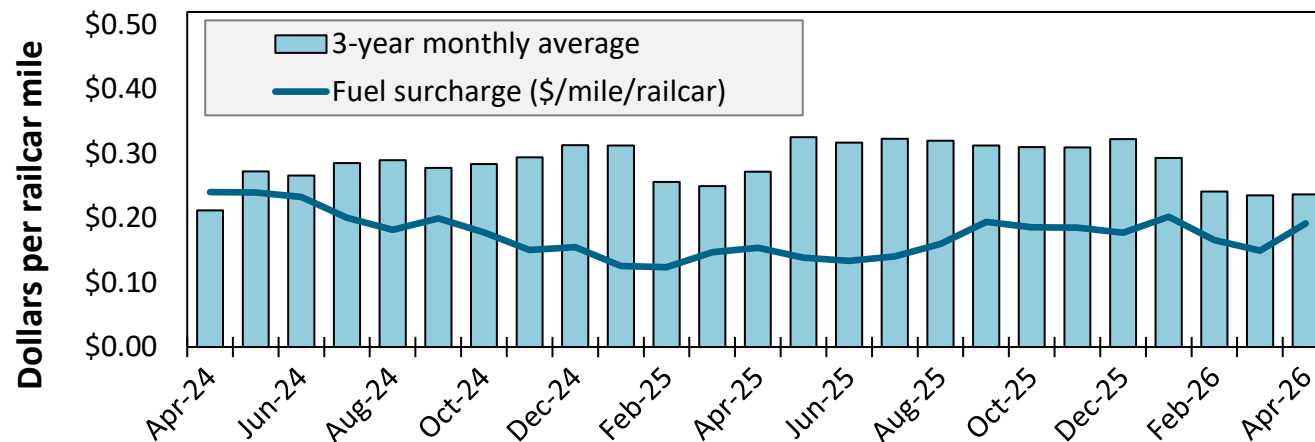
Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, April 2026

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%
	Superior, NE	El Paso, TX	BNSF	Shuttle	\$4,622	\$101	\$4,723	\$1.18	\$46.48	-7.6%
Soybeans	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%
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	\$5,035	\$420	\$5,455	\$1.46	\$53.69	-19.1%
Wheat	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 9. Railroad fuel surcharges, North American weighted average

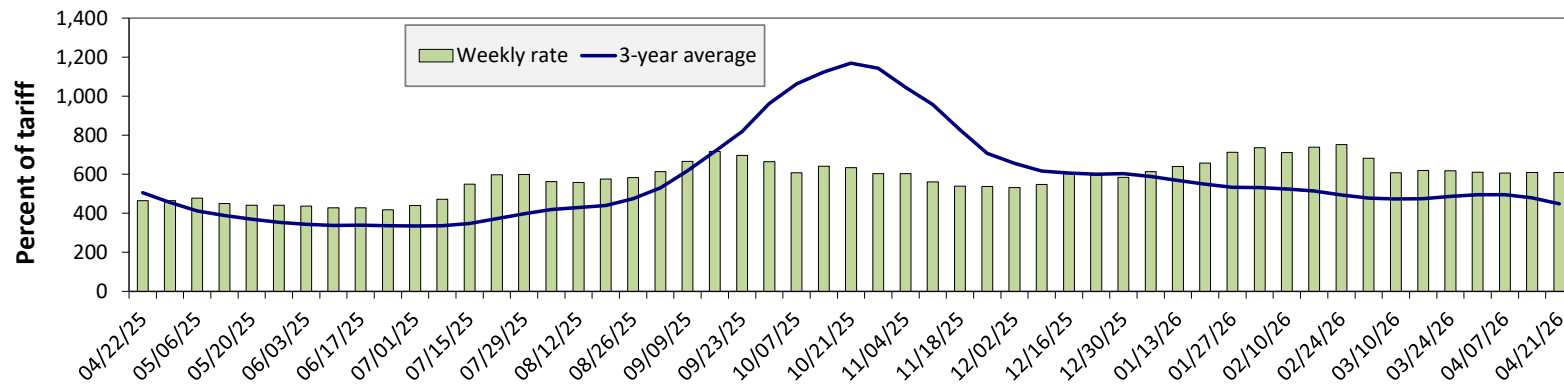


April 2026: \$0.19/mile, up 4 cents from last month's surcharge of \$0.15/mile; up 4 cents from the April 2025 surcharge of \$0.15/mile; and down 5 cents from the April prior 3-year average of \$0.24/mile.

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

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

Figure 10. Illinois River barge freight rate



For the week ending April 21: there is no change from the previous week; 31 percent higher than last year; and 36 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	4/21/2026	716	635	609	454	478	369
	4/14/2026	739	647	609	458	492	375
\$/ton	4/21/2026	44.32	33.78	28.26	18.11	22.42	11.59
	4/14/2026	45.74	34.42	28.26	18.27	23.07	11.78
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	30	24	31	30	28	13
	3-year avg.	43	33	36	39	37	27
Rate	May	689	621	587	442	461	351
	July	656	588	527	417	438	343

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](#).

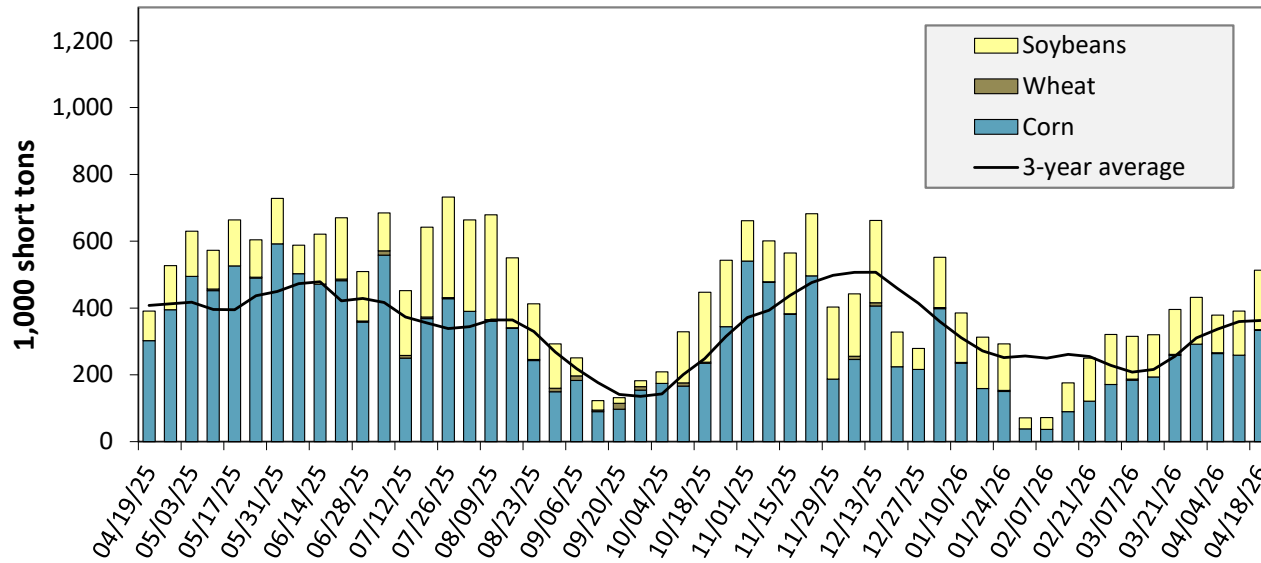
Source: USDA, Agricultural Marketing Service.

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 18: 31 percent higher than last year and 42 percent higher than the 3-year average.

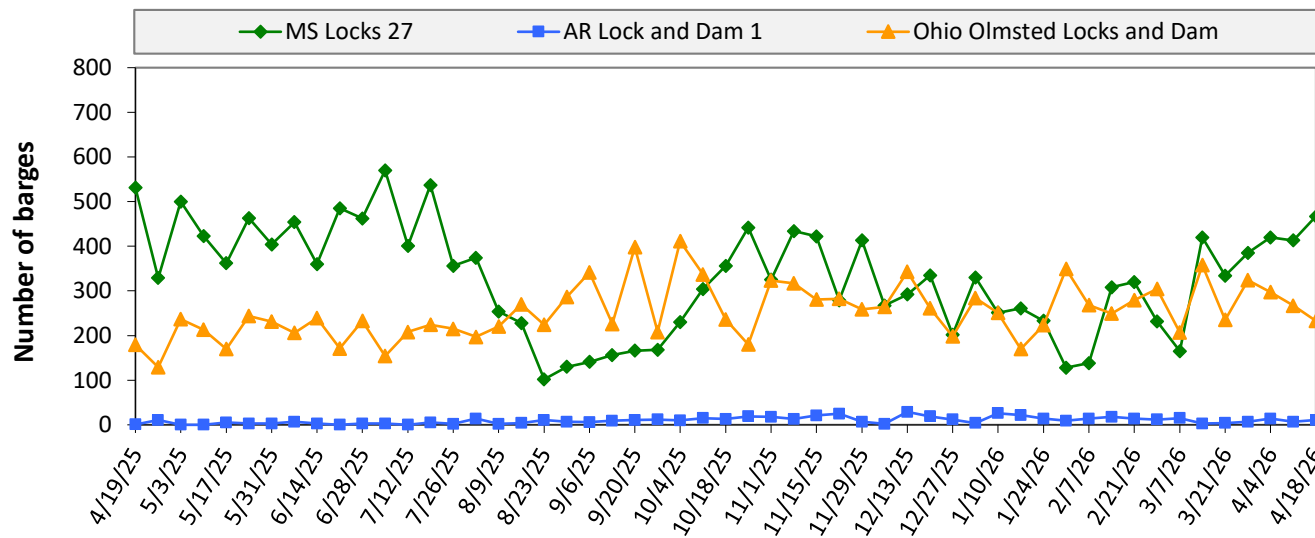
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 04/18/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	88	0	61	0	149
Mississippi River (Winfield, MO (L25))	149	0	121	0	271
Mississippi River (Alton, IL (L26))	318	2	170	0	490
Mississippi River (Granite City, IL (L27))	333	2	178	0	513
Illinois River (La Grange)	178	2	39	0	219
Ohio River (Olmsted)	83	2	85	0	169
Arkansas River (L1)	0	20	17	0	37
Weekly total - 2026	416	24	280	0	720
Weekly total - 2025	313	34	123	0	469
2026 YTD	4,260	266	3,158	28	7,712
2025 YTD	4,978	299	3,503	75	8,855
2026 as % of 2025 YTD	86	89	90	37	87
Last 4 weeks as % of 2025	117	119	120	0	118
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.

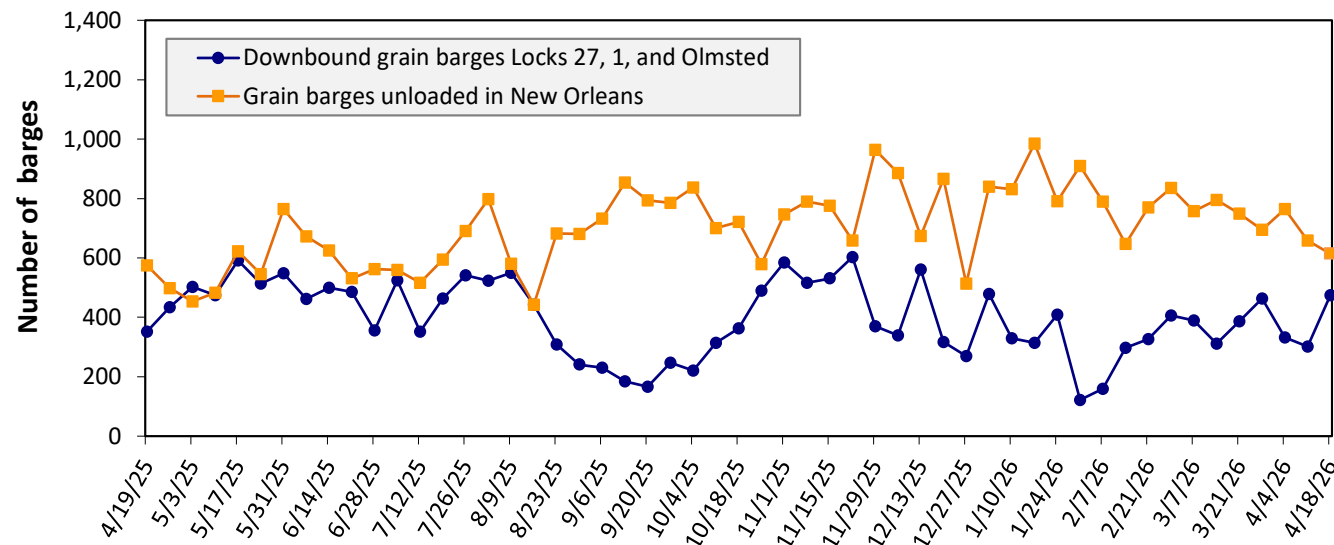
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending April 18: 711 barges transited the locks, 24 barges more than the previous week, and 9 percent higher than the 3-year average.

Source: U.S. Army Corps of Engineers.

Figure 14. Grain barges for export in New Orleans region



For the week ending April 18: 475 barges moved down river, 173 more than the previous week; 614 grain barges unloaded in the New Orleans Region, 7 percent fewer than the previous week.

Note: Olmsted = Olmsted Locks and Dam.

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

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

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

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

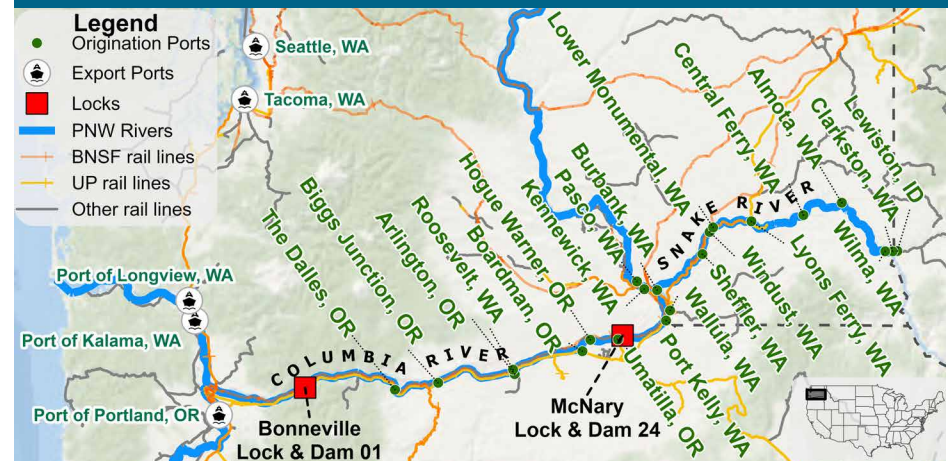
Table 12. Monthly barged grain movements, Columbia-Snake (1,000 tons)

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

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

Source: U.S. Army Corps of Engineers.

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



Source: USDA, Agricultural Marketing Service.

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

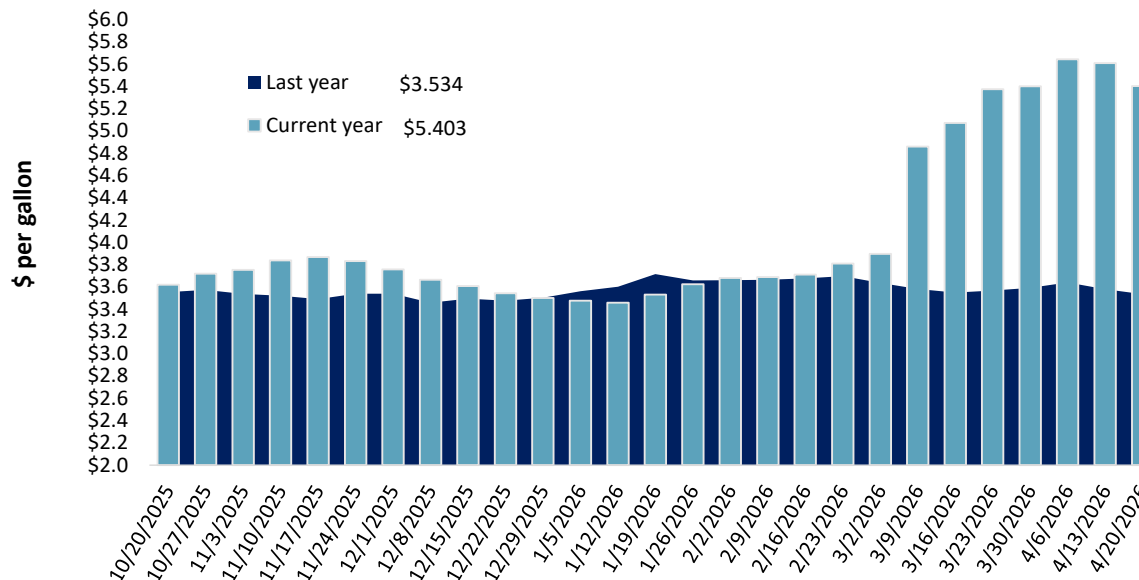
Table 13. Retail on-highway diesel prices, week ending 4/20/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	5.494	-0.180	1.880
	New England	5.862	-0.162	1.929
	Central Atlantic	5.924	-0.072	2.105
	Lower Atlantic	5.297	-0.221	1.792
II	Midwest	5.165	-0.217	1.690
III	Gulf Coast	5.069	-0.241	1.874
IV	Rocky Mountain	5.213	-0.043	1.736
V	West Coast	6.620	-0.202	2.370
	West Coast less California	6.010	-0.173	2.197
	California	7.325	-0.234	2.570
Total	United States	5.403	-0.205	1.869

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 20, the U.S. average diesel fuel price decreased 20.5 cents from the previous week to \$5.403 per gallon, 186.9 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 4/16/2026	1,083	400	1,053	806	102	3,444	21,631	6,415	31,490
	This week year ago	1,050	352	920	836	46	3,205	17,549	4,294	25,047
	Last 4 wks. as % of same period 2024/25	112	142	126	113	248	122	127	165	133
Current shipped (cumulative) exports sales	2025/26 YTD	7,614	2,909	5,351	4,655	529	21,059	52,473	32,103	105,634
	2024/25YTD	4,348	2,771	5,764	4,875	305	18,063	40,185	42,556	100,804
	YTD 2025/26 as % of 2024/25	175	105	93	95	173	117	131	75	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 4/16/2026	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	21,419	19,820	8	19,839
Japan	12,831	10,092	27	10,478
Colombia	6,041	5,891	3	5,493
China	0	33	-100	3,461
Korea	7,551	4,310	75	3,127
Top 5 importers	40,292	35,835	12	39,272
Total U.S. corn export sales	74,103	57,734	28	54,276
% of YTD current month's export projection	88%	80%	-	-
Change from prior week	1,317	1,512	-	-
Top 5 importers' share of U.S. corn export sales	54%	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 4/16/2026	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	11,535	22,338	-48	26,078
Mexico	4,627	4,459	4	4,762
Japan	1,905	1,697	12	2,107
Egypt	4,424	2,766	60	2,098
Indonesia	1,883	1,497	26	1,997
Top 5 importers	24,375	32,756	-26	37,042
Total U.S. soybean export sales	38,518	46,850	-18	48,941
% of YTD current month's export projection	92%	91%	-	-
Change from prior week	365	578	-	-
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 4/16/2026	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	4,522	3,908	16	3,358
Philippines	2,894	2,602	11	2,473
Japan	2,242	2,109	6	2,045
China	336	139	142	1,137
Korea	1,878	2,395	-22	1,674
Taiwan	976	1,013	-4	935
Thailand	661	892	-26	667
Nigeria	1,559	719	117	629
Indonesia	1,091	754	45	518
Colombia	723	474	53	489
Top 10 importers	16,882	15,006	13	13,926
Total U.S. wheat export sales	24,503	21,268	15	19,135
% of YTD current month's export projection	100%	95%	-	-
Change from prior week	129	-14	-	-
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)

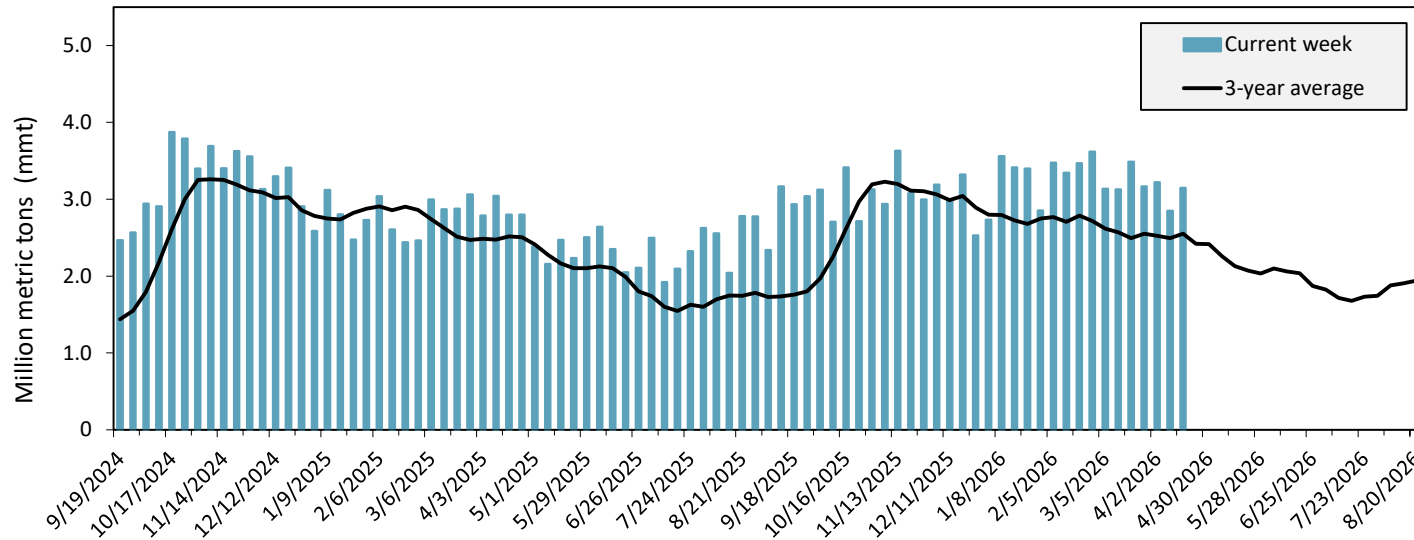
Port regions	Commodity	For the week ending 04/16/2026	Previous week*	Current week as % of previous	2026 YTD*	2025 YTD*	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	572	474	121	7,607	7,557	101	87	119	24,214
	Soybeans	133	68	196	3,176	1,791	177	178	304	2,957
	Wheat	265	137	194	2,953	3,136	94	73	76	12,271
	All grain	980	679	144	13,748	12,573	109	91	115	39,721
Mississippi Gulf	Corn	735	824	89	11,528	11,287	102	110	130	37,115
	Soybeans	453	560	81	9,545	8,655	110	90	96	23,350
	Wheat	90	42	215	998	1,088	92	59	63	3,980
	All grain	1,278	1,425	90	22,071	21,030	105	99	112	64,484
Texas Gulf	Corn	0	55	0	431	105	411	n/a	503	590
	Soybeans	0	0	n/a	100	106	94	n/a	n/a	1,431
	Wheat	68	28	241	1,302	955	136	76	107	4,690
	All grain	248	283	88	4,272	1,250	342	259	205	7,774
Interior	Corn	302	236	128	4,703	3,723	126	104	118	15,546
	Soybeans	108	104	104	2,139	2,007	107	99	113	7,712
	Wheat	74	65	113	899	850	106	102	118	3,104
	All grain	507	423	120	7,887	6,704	118	101	117	26,887
Great Lakes	Corn	42	0	n/a	65	0	n/a	n/a	n/a	414
	Soybeans	0	0	n/a	0	0	n/a	n/a	0	63
	Wheat	21	0	n/a	43	53	82	104	110	434
	All grain	63	0	n/a	108	53	204	313	252	911
Atlantic	Corn	19	33	57	517	122	425	425	625	607
	Soybeans	55	8	713	403	425	95	n/a	556	1,085
	Wheat	0	0	n/a	0	0	n/a	n/a	0	81
	All grain	74	41	181	920	546	169	642	559	1,773
All Regions	Corn	1,669	1,622	103	24,851	22,793	109	105	128	78,486
	Soybeans	749	739	101	15,768	13,088	120	109	123	36,851
	Wheat	518	272	190	6,195	6,082	102	74	83	24,560
	All grain	3,148	2,851	110	49,410	42,261	117	105	121	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.

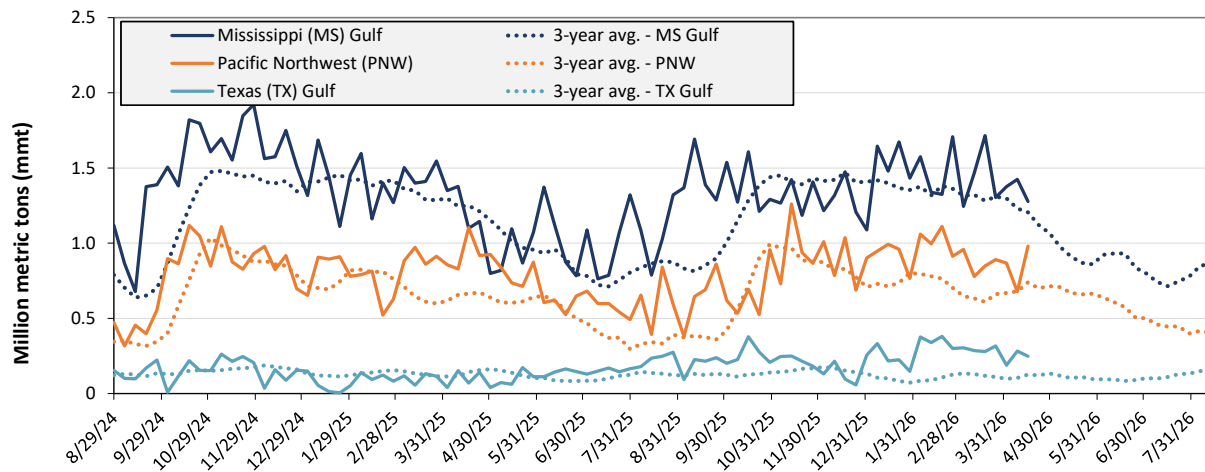
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending April 16: 3.1 mmt of grain inspected, up 10 percent from the previous week, up 9 percent from the same week last year, and up 23 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 04/16/26 inspections (mmt):

MS Gulf: 1.28

PNW: 0.98

TX Gulf: 0.25

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 10	down 12	down 11	up 44
Last year (same 7 days)	up 4	up 126	up 14	down 3
3-year average (4-week moving average)	up 6	up 96	up 15	up 32

Source: USDA, Federal Grain Inspection Service.

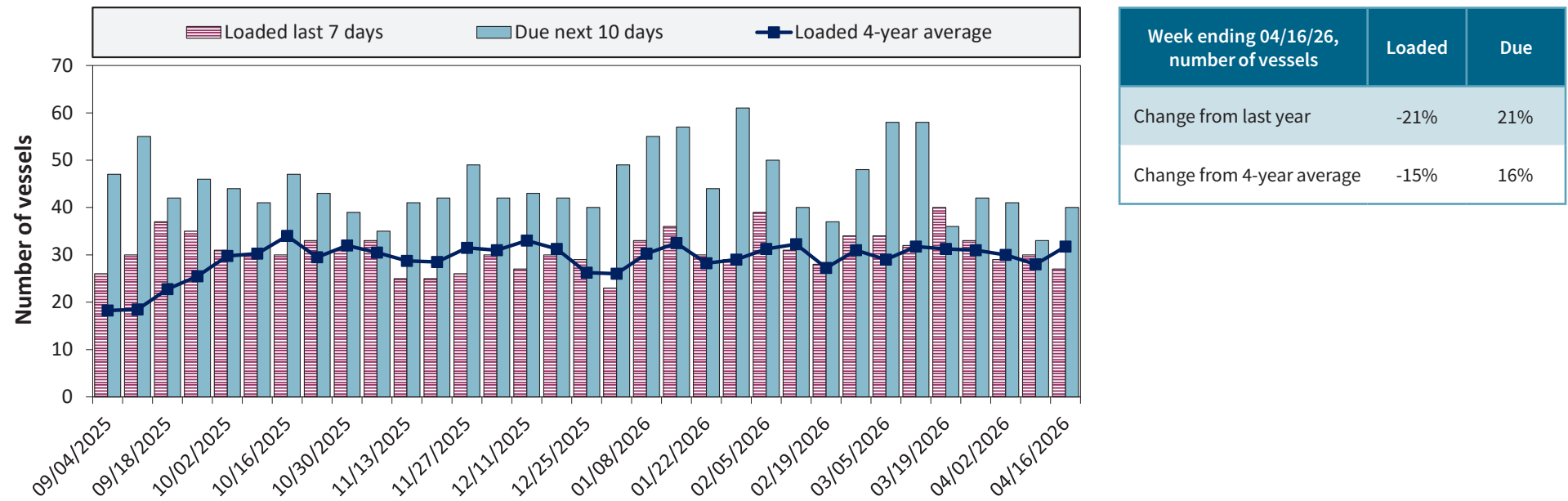
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
4/16/2026	22	27	40	15
4/9/2026	20	30	33	15
2025 range	(12...40)	(11...37)	(26...55)	(5...25)
2025 average	28	28	45	13

Note: The data are voluntarily submitted and may not be complete.

Source: USDA, Agricultural Marketing Service.

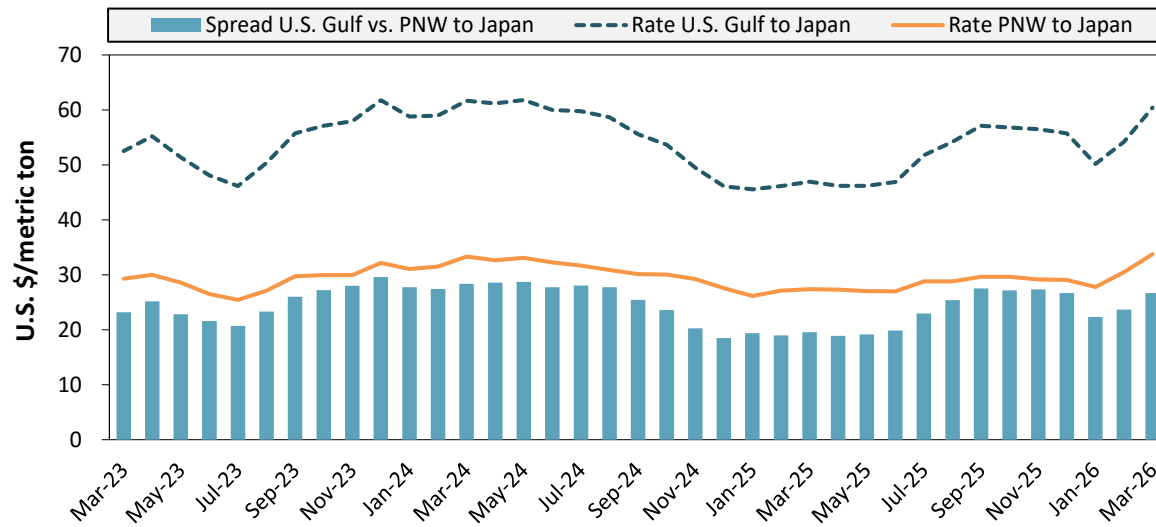
Figure 19. U.S. Gulf vessel loading activity



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

Source: USDA, Agricultural Marketing Service.

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



Note: PNW = Pacific Northwest

Source: O'Neil Commodity Consulting /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 04/18/2026

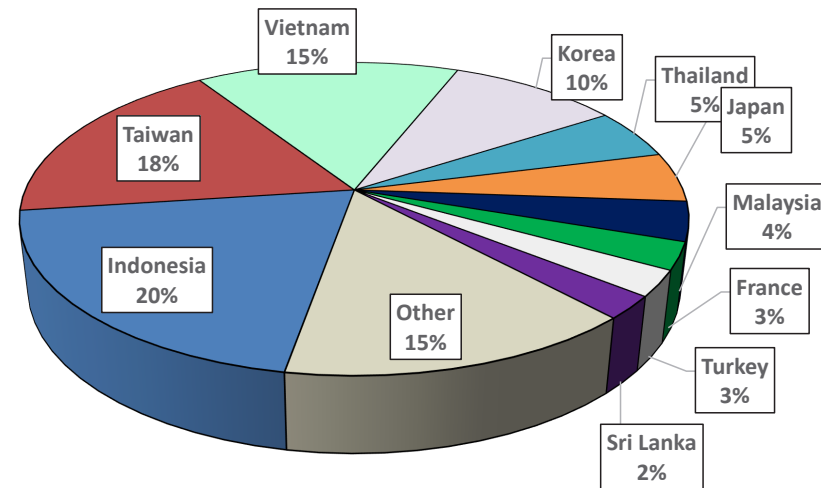
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Colombia	Soybean meal	Mar 24, 2026	May 1/10, 2026	50,000	31.60
PNW	Bangladesh	Soybeans	Mar 11, 2026	May 1/10, 2026	48,400	57.31
PNW	S. Korea	Heavy grain	Mar 12, 2026	May 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	Heavy grain	Apr 17, 2026	May 5/14, 2026	66,000	52.00
Brazil	N. China	Soybeans	Apr 2, 2026	Apr 10/23, 2026	65,000	53.00
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.

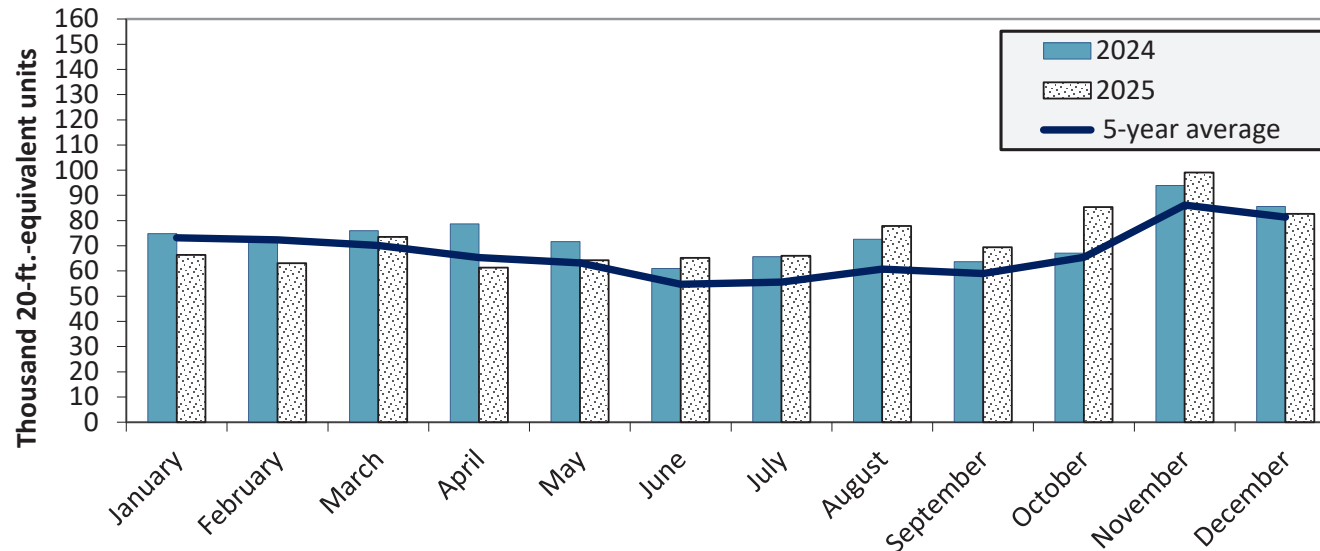
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Dec 2025



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 PERS data, S&P Global.

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



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

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

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

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

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