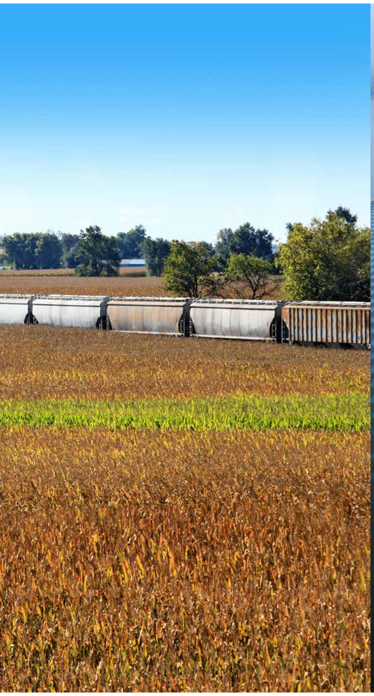
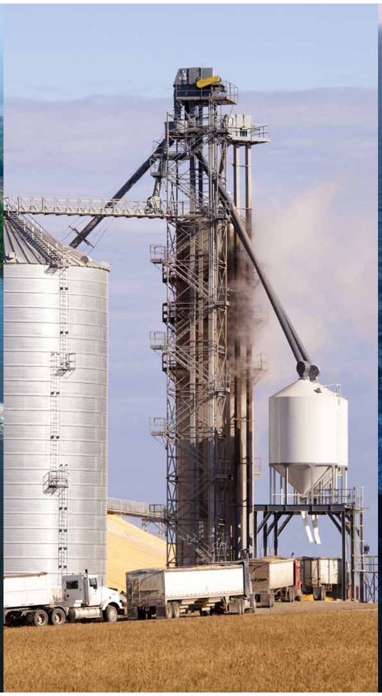
Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE






Contents

Grain Transportation Report

April 30, 2026
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www.ams.usda.gov/GTR

STB Approves Construction of Eagle Pass Short Line Railroad. On April 22, the Surface Transportation Board (STB) authorized Green Eagle Railroad, LLC (GER) to build and operate a 1.3-mile rail line and bridge at the Eagle Pass, TX, border crossing, "to offer shippers a more fluid freight rail option crossing the U.S.-Mexico border." Currently, the only rail bridge crossing at Eagle Pass is owned and operated by Union Pacific Railroad (UP), with BNSF Railway (BNSF) having trackage rights.

First proposed by GER in December 2023, this new infrastructure (if built) would be an attempt to ease congestion and handle future traffic growth at the Eagle Pass crossing (*Grain Transportation Report (GTR)*, *December 21, 2023, second highlight*). With the new line and bridge, GER would interchange U.S. traffic—from UP and BNSF—with the Mexican carrier, Ferromex. However, GER has stated it will not begin construction unless UP and BNSF agree to shift their Eagle Pass traffic to GER. UP has previously said it has no plans to shift its traffic to GER (GTR, August 28, 2025, fourth highlight).

Eagle Pass is the top gateway for overland soybean exports to Mexico (*U.S. Grain Rail Exports to Mexico*).

White House Extends Jones Act Suspension for Additional 90 Days. Last month, the U.S. President issued a 60-day suspension of the Merchant Marine Act of 1920 (commonly referred to as the "Jones Act") for fertilizer and energy products (GTR, March 19, 2026, second highlight). The President recently extended this Jones Act waiver for an additional 90 days, enabling foreign-flagged vessels to transport cargoes between U.S. ports until mid-August.

Based on reports submitted to the U.S. Maritime Administration (as of April 27), 19 shipments have utilized the Jones Act waiver. From March 14 to 19, a Marshall Islands-flagged vessel transported over 120,000 barrels of renewable diesel from the Marathon terminal in Martinez, CA, to the Olympus terminal in Los Angeles, CA.

Other shipments that utilized the waiver included 135,000 barrels of ethanol from Galveston, TX, to Houston, TX, and 25,400 metric tons of anhydrous ammonia from Donaldsonville, LA, to Taft, LA. Most of the shipments under the waiver contained petroleum-based products.

Strait of Hormuz Closure Induces Congestion at the Panama Canal. Over the past 2 months, the ongoing conflict between the United States and Iran has effectively closed commercial traffic through the Strait of Hormuz—a key passage for global oil and gas flows. Without access to the Persian Gulf, global energy buyers have increasingly turned to the U.S. Gulf.

This redirection of demand and traffic have resulted in rising congestion at the Panama Canal—which provides the shortest route from the U.S. Gulf to East Asia. According to the Panama Canal Authority, the average waiting period for southbound ships arriving without a reservation was 10.8 days on April 30—up from just 1 day at the end of March.

Dry bulk vessels carrying grain often transit the Canal without a reservation because they operate as needed. For vessel operators needing a timely transit, the Panama Canal Authority also allocates several transit slots per day through an auction. According to *Lloyd's List*, the average auction price for a Panamax locks slot for the week ending April 20 was $837,500—the highest since at least January 2024.

New Wisconsin Laws Raise Ag Weight Limits for Trucks and Expand Access to CDL Training. The Governor of Wisconsin recently signed into law two bills—Assembly Bill 679 and Assembly Bill 766—supporting the State's agricultural transportation.

Assembly Bill 679 creates a statewide permit to allow six-axle trucks carrying agricultural commodities (like grain, feed, and fertilizer) to operate up to 91,000 pounds on state highways. The goal is to improve efficiency, reduce transportation costs, and keep Wisconsin competitive with neighboring States.

Assembly Bill 766 expands eligibility for Wisconsin's commercial driver license (CDL) training grants beyond training providers. This change increases flexibility, broadens access to CDL training, and helps grow the State's commercial driver workforce.

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 23, unshipped balances of corn, soybeans, and wheat for marketing year (MY) 2025/26 totaled 30.94 million metric tons (mmt), down 2 percent from last week and up 30 percent from the same time last year.

Net corn export sales for MY 2025/26 were 1.60 mmt, up 21 percent from last week. Net soybean export sales were 0.26 mmt, down 29 percent from last week. Net wheat export sales were 0.23 mmt, up 176 percent from last week.

Rail

U.S. Class I railroads originated 30,681 grain carloads during the week ending April 18. This was an 8-percent increase from the previous week, 26 percent more than last year, and 26 percent more than the 3-year average.

Average May shuttle secondary railcar bids/offers (per car) were $369 above tariff for the week ending April 23. This was $31 less than last week and $472 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were $42 above tariff. This was $27 less than last week and $21 lower than this week last year.

Barge

For the week ending April 25, barged grain movements totaled 638,150 tons. This was 11 percent less than the previous week and 5 percent less than the same week last year.

For the week ending April 25, 422 barges moved down river, 53 fewer than the previous week. There were 784 grain barges unloaded in the New Orleans region, 28 percent more than the previous week.

Ocean

For the week ending April 23, 26 oceangoing grain vessels were loaded in the Gulf—4 percent more than the same period last year. Within the next 10 days (starting April 24), 42 vessels were expected to be loaded—56 percent more than the same period last year.

As of April 23, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $66.50, down 1 percent from the previous week. The rate from the Pacific Northwest to Japan was $35.00 per mt, down 1 percent from the previous week.

Fuel

For the week ending April 27, the U.S. average diesel fuel price decreased 5.2 cents from the previous week to $5.351 per gallon, 183.7 cents above the same week last year.

High Plains Grain Shipper Challenges K&O Paper Barrier and Rate Reasonableness

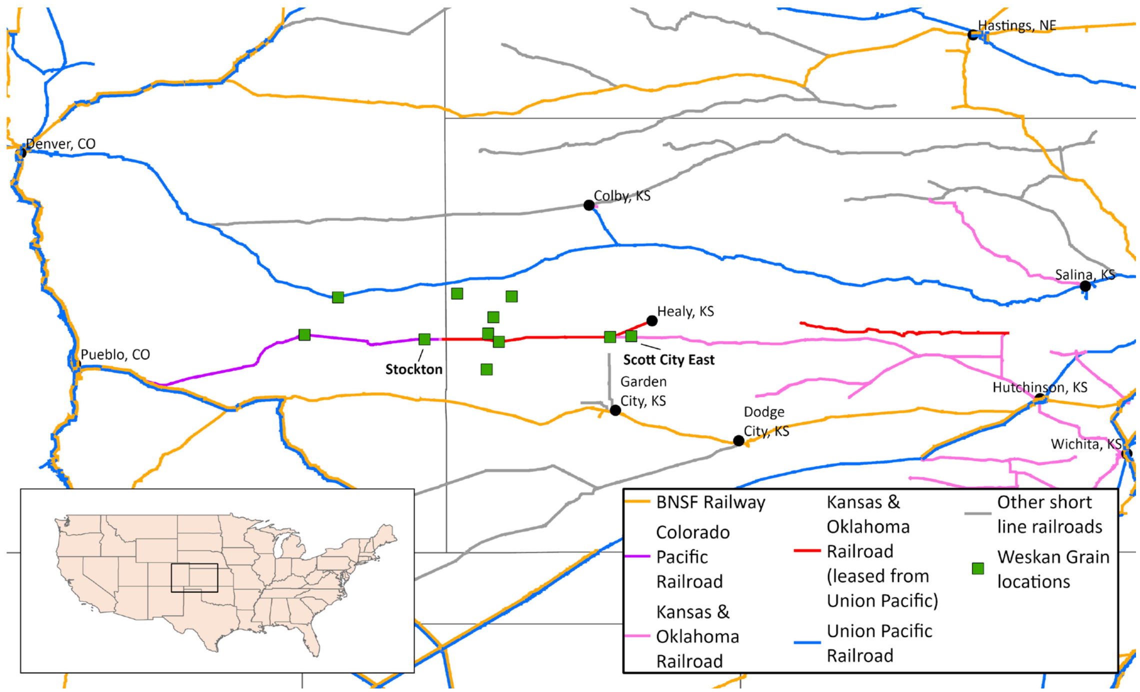
Beginning in late 2024, a grain shipper in the High Plains, Weskan Grain, LLC (Weskan), alleged that its rail carrier, Kansas and Oklahoma Railroad (K&O), has violated its general obligations, as codified in Title 49 and overseen by the Surface Transportation Board (STB)—the Federal agency with economic oversight of the rail industry. Although Congress largely deregulated the U.S. rail industry in the 1980s, railroads still have a statutory common-carrier duty to serve shippers without discrimination, charge reasonable rates, and interchange traffic with connecting carriers.

Attempting to correct alleged violations of Title 49, Weskan has brought two cases against K&O before STB. The first case challenges the legality of an interchange commitment (also referred to as a "paper barrier") that, Weskan argues, effectively closed its preferred routing. The second case is a rate reasonableness challenge—STB's first rate case involving grain in almost 30 years. This article summarizes these two cases at STB. Outside of STB, Weskan has filed an [antitrust lawsuit] against K&O and Union Pacific Railroad (UP).

Background: Weskan Grain Seeks Western Outlet

[Weskan] (part of the [Soloviev Group]) is a grain company in western Kansas and eastern Colorado that operates 6.3 million bushels (mbu) of upright storage and 6 mbu of ground storage across 11 locations (fig. 1). The company primarily handles wheat, sorghum, and corn. In [May 2023], Weskan began operating a 3.1-mbu upright-shuttle-loading and shuttle-receiving elevator in Stockton, CO.

Figure 1. Map of Weskan Grain, LLC, locations



Source: USDA/Agricultural Marketing Service analysis of Weskan Grain, LLC, information (website and filings) and U.S. Department of Transportation, Bureau of Transportation Statistics, North American Rail Network database.

The Stockton location is served by the Colorado Pacific Railroad (CXR)—a short line railroad that the Soloviev Group acquired in 2017 and subsequently rehabilitated.[1] The CXR operates across a 122-mile line from Towner, CO (6 miles east of Stockton siding), to a junction east of Pueblo, CO—where the short line can interchange with BNSF Railway (BNSF) and UP (fig. 1).

Besides the Stockton facility, Weskan has other rail-loading facilities located on the K&O, such as "Scott City East" in Kansas.[2] K&O is a short line that operates about 940 route miles in western-central Kansas and far-eastern Colorado. After acquiring the Scott City East facility in 2023, Weskan invested $18 million in expansions to handle grain shuttle trains. Since opening both the Stockton and Scott City East facilities, Weskan has sought to ship grain westward (over the K&O) from its Scott City East facility to its Stockton facility because Stockton has better freight rates to West Coast destinations.

For example, the current (April 2026) freight rate to ship a single car of wheat from Weskan's Stockton facility to Southern California flour mills is $6,964 per car via BNSF and $6,380 via UP. (Using BNSF's domestic efficiency trains provides an additional $800 per car savings than the single car rate.) For comparison, the same rate from Weskan's Scott City East facility (via UP) is $7,895 per car—*over $1,500 per car more* than the Stockton rate.

Although Weskan wants to move grain west (e.g., from Scott City East to Stockton), its filings to STB describe two main obstacles: (1) an interchange commitment (or paper barrier) that (Weskan says) forecloses the interchange between K&O and CXR, and (2) rates that (Weskan says) are unreasonably high.

K&O, UP, and Weskan Argue Over Paper Barrier

Since 1997, K&O (or its predecessor) has leased the line between Healy, KS, and Towner, CO, from UP (fig. 1). Weskan alleges UP and K&O imposed a paper barrier in the line's lease agreement to prevent Weskan from moving grain to its Stockton facility.

What Are Paper Barriers? Since enactment of the Staggers Rail Act of 1980, larger railroads have sold or leased thousands of miles of low-density branch lines to short line railroads. While these line sales/leases have preserved service on lines that otherwise may have been candidates for abandonment, many of these sales/leases have included interchange commitment provisions (commonly called "paper barriers") that limit the ability (or steer the incentive) of short line railroads to interchange traffic with a connecting carrier other than the seller/lessor. Common forms include credits for interchanging cars with the seller, financial penalties for interchanging with another railroad, or an outright ban on interchange with other carriers.

STB evaluates the legality of paper barriers case by case rather than imposing a blanket ban. To support that case-specific review, STB strengthened its disclosure and access rules in 2008 and 2013. Today, parties to a sale or lease that includes an interchange commitment must disclose its existence; file a confidential, complete copy of the agreement with STB; and provide a fast-track access process so shippers/affected parties can obtain the agreement.

Because the exact terms of interchange commitments are commercially sensitive, they are not made fully public. However, shippers affected by older, existing commitments can obtain confidential access to the agreements if they formally challenge them. To trigger this discovery process, a shipper must file a complaint or petition with STB—for example, alleging that the commitment violates the Interstate Commerce Act, or asking the agency to reopen the proceeding that originally authorized the rail line's sale.

Weskan Opens Paper Barrier Case at STB. In a November 2024 petition to STB, Weskan challenged the legality of an "undisclosed paper barrier" that the shipper claimed foreclosed its ability to ship grain from its K&O-served

1 The railroad's reporting mark is "CXR." "CPR" belongs to the former Canadian Pacific Railway.
2 Weskan's other locations on the K&O are smaller than Scott City East.

locations to its Stockton facility.[3] Weskan petitioned STB to disclose the terms of the UP and K&O lease and to direct the railroads to eliminate all interchange commitment restrictions.

In **December 2024**, STB granted Weskan's request to see the previously undisclosed lease between K&O and UP. After gaining access, **Weskan reported** that the original 1997 lease signed by UP and K&O's predecessor was "largely unchanged" until 2018—coinciding with CXR's acquisition of the line to Stockton. That year and again in 2019, the lease was amended. Most notably, in 2019, the original interchange commitment was replaced with a different interchange commitment involving an "asset use fee" (paid per car to UP).

Because UP and K&O had not previously received STB authorization for these 2018 and 2019 lease amendments—in **February 2025**, STB directed K&O to seek after-the-fact authority, which K&O filed with STB in **March 2025**.[4] In its filing, K&O disclosed that its lease with UP limited third-party interchanges, but the short line contended that the lease was still consistent with the national rail transportation policy and should be approved.

In an **April 2025** filing, Weskan opposed K&O's lease renewal, arguing that the amended commitment was inserted to economically foreclose K&O from interchanging traffic with CXR, forcing traffic to flow east to UP. Weskan emphasized the punitive nature of the asset use fee, noting it "far exceeds…all but a few" of K&O's current tariff rates.

As shown in a **December 2025** filing, UP had earlier proposed to waive the fee for Weskan's K&O-CXR interchange traffic for the balance of the current lease term, arguing this action rendered the STB proceeding moot. Weskan **rejected UP's offer**, noting that UP could reinstate the asset use fee when the lease was up for renewal. **K&O, meanwhile, argued** that Weskan's continued opposition proved the dispute was actually an attempt by Weskan to use the STB proceeding to extract unmerited rate reductions. **UP backed K&O**, defending asset use fees as "procompetitive," arguing they allow short lines to operate without paying high fixed rents. UP also noted that (per car) asset use fees vary with traffic levels and thus respond to market conditions.

In **March 2026**, STB denied K&O's petition for the lease's renewal. STB found that K&O failed to meet its burden of proof to show the lease was consistent with rail transportation policy. STB agreed with Weskan that the lack of interchanged traffic created a "strong inference" of foreclosure, and noted that UP's temporary waiver for one shipper did not resolve STB's broader public interest concerns. STB directed K&O to resubmit a fully supported application (by May 4, 2026) that adequately explains the benefits of the interchange commitment.

Weskan Initiates Rate Case Against K&O

Besides the paper barrier (in the form of an asset use fee), Weskan also contends that K&O's rates to ship grain west to its Stockton facility are unreasonably high. As a result, Weskan has initiated a rate case at STB. The case is notable for several reasons. For one, it is the first rate case involving grain since *McCarty Farms v. BN* (decided in 1997). Also, it is only the third rate case against a short line railroad. Finally, it is STB's **only pending rate case**, as the last case was settled in November 2023.

STB's Rate Review Process. Only public common carrier (non-contract) tariff rates for non-exempt commodities can be challenged. In addition, the railroad must have "market dominance" over the shipment at issue.[5] As a final hurdle, the rate under review must exceed 180 percent of the shipment's variable cost.

Once these conditions are met, STB then considers if the rate is unreasonable using one of STB's rate review methodologies. The most used rate review methodology is the stand-alone cost (SAC) test. Under the SAC test, a railroad may not charge a shipper more than it would cost to build and operate efficiently—at

3 Weskan's initial petition was filed under Finance Docket (FD) No. 34030—the original docket involving the UP/K&O lease transaction. Although initially a point of contention, it was later learned (in the FD No. 36849 proceeding) that the fee does not apply to grain loaded at Weskan's Scott City East and Scott City Kirk facilities, as those sit on track *owned* by K&O. At issue are current and potential locations, like Weskan's "Whitelaw" facility in Tribune, KS, which lie on track K&O *leases* from UP. Other grain shippers are also located on leased K&O track and would be subject to the fee, if they interchange with CXR.
4 K&O's request for after-the-fact authority for its lease amendments is filed under FD No. 36849.
5 Market dominance is defined as the absence of intermodal or intramodal competition.

current costs—a hypothetical new railroad, tailored to serve a traffic group that includes the complainant's traffic. STB has other (simplified) rate review methodologies, but they have rate relief caps.

Weskan's Rate Complaint. In December 2025, Weskan submitted a notice of its intent to initiate a rate case, which triggered a 70-day waiting period and included STB-sponsored mediation. Mediation was unsuccessful, and on April 17, Weskan submitted a rate complaint against K&O's rates for moving sorghum, wheat, and corn from Weskan's Scott City East facility to its Stockton facility.[6]

The dispute centers on both pricing and service terms, as Weskan specifically requested rates for 50-car shuttle trains, but K&O instead established rates for nondedicated manifest service, 50-car blocks. Weskan contends that K&O is market dominant for the transportation of grain from Scott City East to Stockton, that there is "no economically feasible transportation alternative," and transporting grain between facilities by truck (roughly 80 miles) "would be prohibitively costly compared to maximum reasonable rail rates."

Weskan notes that the $850 per car rate for using K&O-supplied railcars results in a revenue-to-variable cost (R/VC) ratio of 285 percent, while the $825 per car rate for shipper-supplied cars results in an R/VC ratio of 343 percent. Weskan emphasized to STB that both ratios far exceed the agency's 180-percent jurisdictional threshold.

Weskan has chosen to challenge the rates using STB's SAC test. If STB accepts Weskan's complaint, STB will decide the case by August 15, 2027 (485 days after the complaint is filed).

Conclusion

The STB proceedings (and the Federal court case) underlie Weskan's ability to ship Kansas-grown grain westward. Weskan noted, to date, "K&O has never shipped any grain from Kansas to the Stockton Facility since it became operational in 2023." Weskan suggests it needs relief in both STB proceedings: first, from the "asset use fee," which financially penalizes K&O (on leased track) for interchanging traffic with CXR and which K&O passes on to Weskan. Additionally, Weskan maintains that economically feasible shipments from Scott City to Stockton would require relief from "unreasonable" rates—even on shipments not subject to the fee (on K&O owned track).

Conversely, UP and K&O argue that the dispute over the asset use fee is entirely moot because UP offered to unconditionally waive its right to collect the fee for Weskan's K&O-CXR interchange traffic for the remainder of the current lease. The railroads maintain that Weskan's continued pursuit of the lease case, despite the waiver, proves the conflict is fundamentally a commercial rate dispute. Although K&O has not yet weighed in in the rate case proceeding, its lease-related filings offer insight. K&O has argued its rate levels to the far west end of the line are driven by "legitimate commercial realities" that reflect "significantly higher unit costs associated with handling modest traffic flows" in a low-density region.

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6 Since Weskan's rate complaint differed slightly from its original notice (e.g., shifting from 75-car trains to 50-car trains), Weskan's filing also requested STB to waive any need for a new notice of intent and 70-day mediation period.

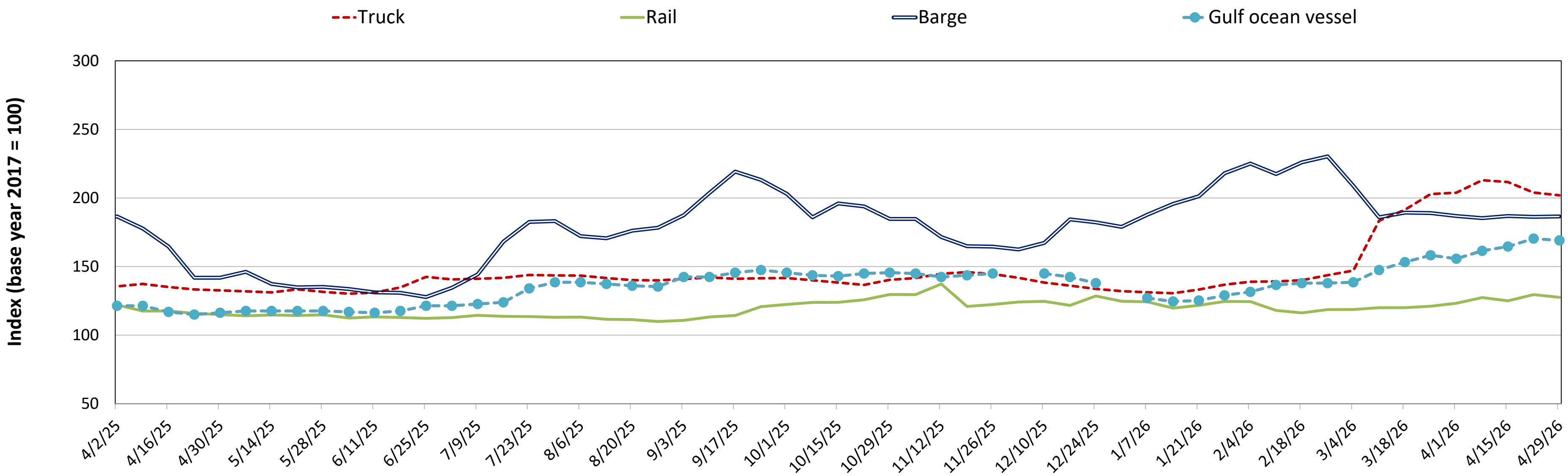
Grains are transported to the domestic and international markets via one or more of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
04/29/26	202	128	187	169	166
04/22/26	204	130	186	170	169
04/30/25	133	115	142	116	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.

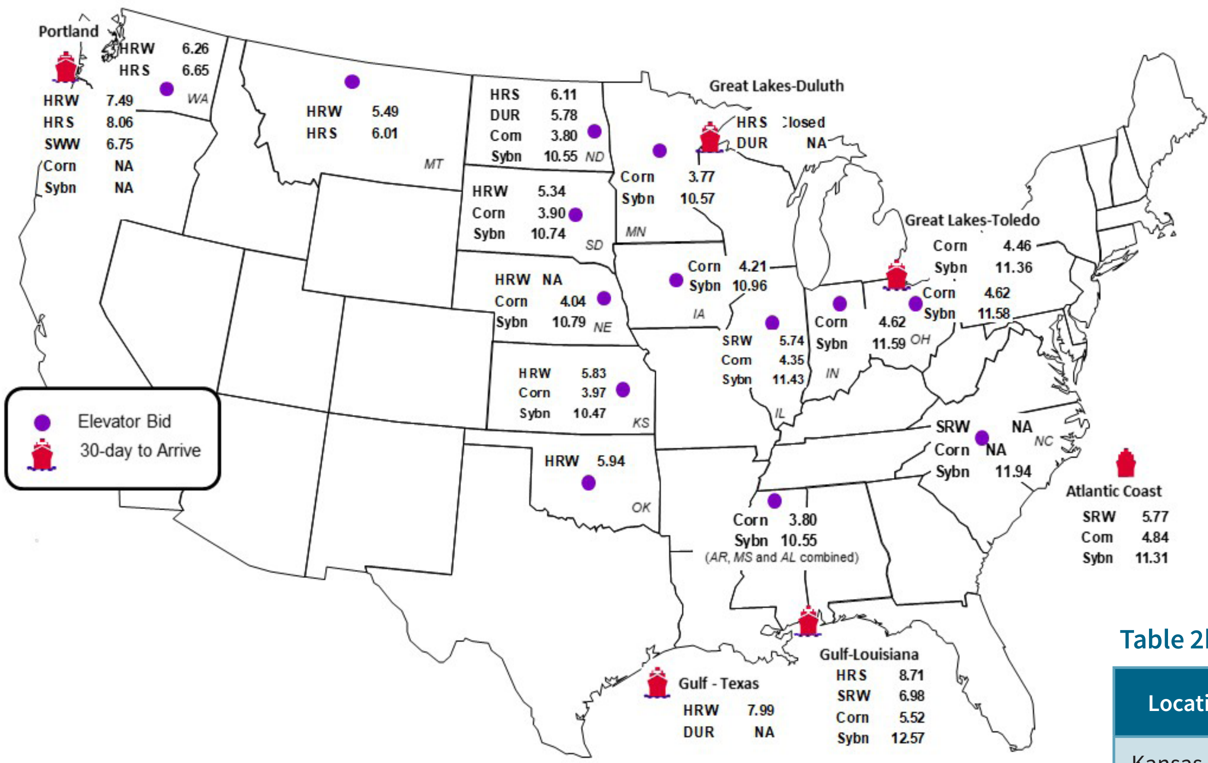
Figure 1. Grain transportation cost indicators as of week ending 4/29/26



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: For U.S. inland data: GeoGrain, and USDA, Agricultural Marketing Service (AMS), *Market News Report*. For corn & soybean export bids: USDA, AMS, *Export Grain Bids Report*. For wheat bids: U.S. Wheat Associates, *Weekly Wheat Report*.

Table 2a. Market update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	4/24/2026	4/17/2026
Corn	IL–Gulf	-1.17	-1.15
Corn	NE–Gulf	-1.48	-1.46
Soybean	IA–Gulf	-1.61	-1.59
HRW	KS–Gulf	-2.16	-2.13
HRS	ND–Portland	-1.95	-1.97

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	4/24/2026	Week ago 4/17/2026	Year ago 4/25/2025
Kansas City	Wheat	May	6.696	6.500	5.508
Minneapolis	Wheat	May	6.760	6.533	5.912
Chicago	Wheat	May	6.168	5.992	5.450
Chicago	Corn	May	4.634	4.566	4.854
Chicago	Soybean	May	11.786	11.828	10.592

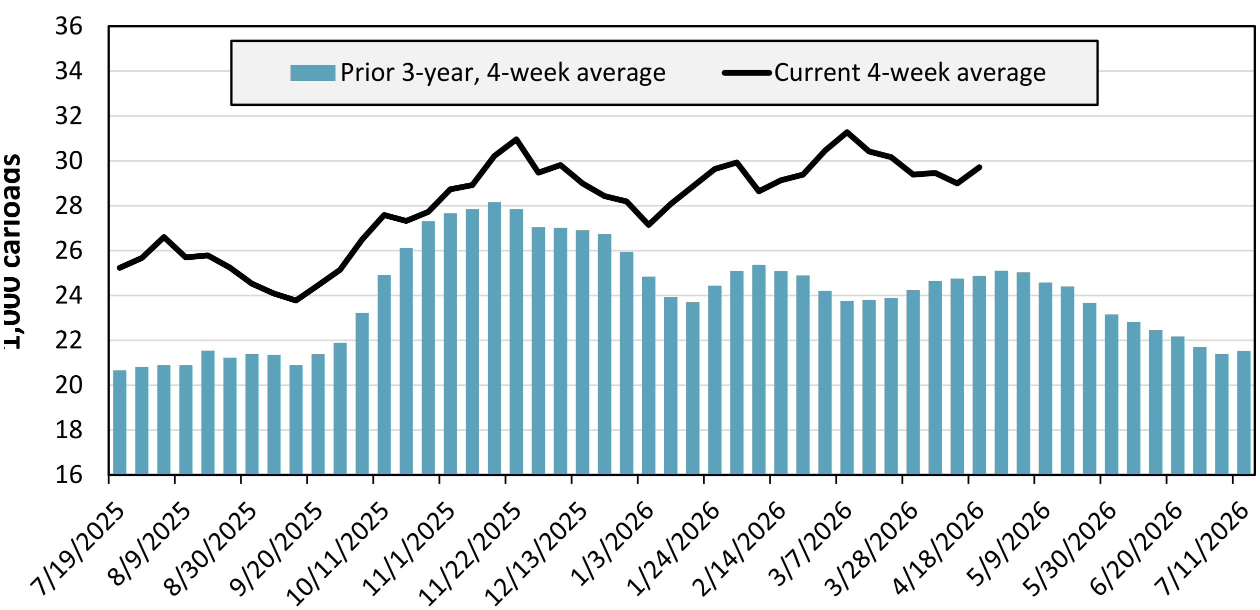
Sources: For U.S. inland data: GeoGrain, and USDA, Agricultural Marketing Service (AMS), *Market News Report*. For corn & soybean export bids: USDA, AMS, *Export Grain Bids Report*. For wheat bids: U.S. Wheat Associates, *Weekly Wheat Report*.

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

For the week ending: 4/18/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,832	2,540	14,034	6,667	4,035	1,573	30,681
This week last year	1,677	2,931	10,672	5,158	2,550	1,378	24,366
2026 YTD	23,016	40,326	199,170	106,120	53,486	26,855	448,973
2025 YTD	26,940	45,836	174,902	90,884	40,199	21,760	400,521
2026 YTD as % of 2025 YTD	85	88	114	117	133	123	112
Last 4 weeks as % of 2025	96	90	111	112	127	115	110
Last 4 weeks as % of 3-yr. avg.	88	101	123	119	134	139	119
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 18, grain carloads were up 2 percent from the previous week, up 10 percent from last year, and up 19 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: 4/17/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	29.5	18.4	19.7	17.7	19.5	20.2	20.8
	Average over last 4 weeks	26.1	25.5	26.2	18.5	14.3	19.4	21.6
	Average of same 4 weeks last year	49.3	32.5	20.4	15.1	11.0	n/a	25.7
Average grain unit train speeds (miles per hour)	This week	22.8	18.2	23.9	23.7	22.1	20.2	21.8
	Average over last 4 weeks	22.9	17.9	24.0	23.5	21.5	18.9	21.4
	Average of same 4 weeks last year	21.2	18.3	24.4	21.9	23.5	n/a	21.8

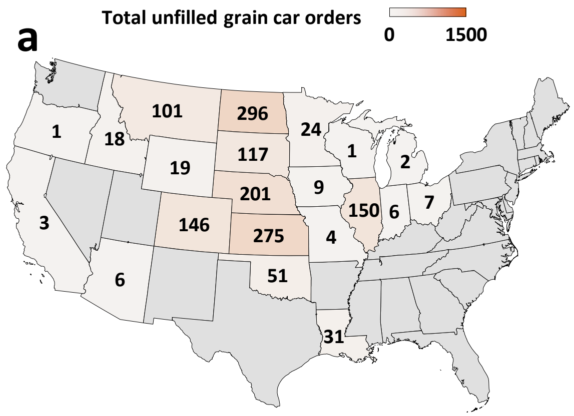
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City; n/a = not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.
Source: Surface Transportation Board.

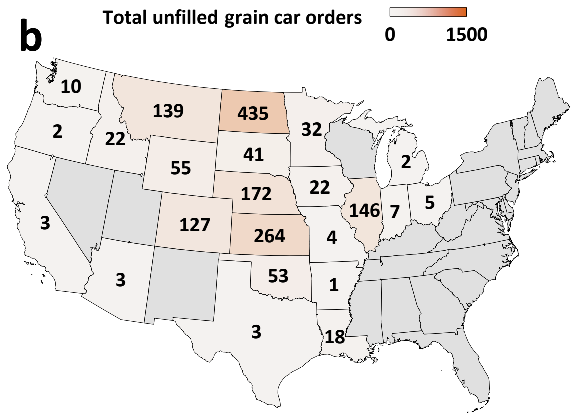
Table 4b. Rail service metrics—unfilled grain car orders and delays

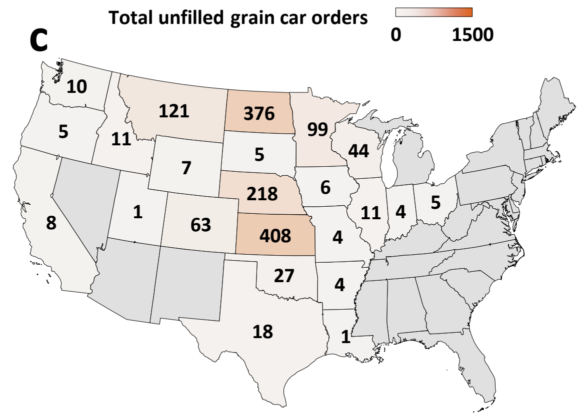
For the week ending: 4/17/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	30	24	301	36	9	125	524
	Average over last 4 weeks	48	24	398	47	17	281	814
	Average of same 4 weeks last year	69	8	307	98	11	n/a	493
Average number of loaded grain cars not moved in over 48 hours	This week	56	150	412	49	22	146	835
	Average over last 4 weeks	56	131	422	48	29	257	943
	Average of same 4 weeks last year	120	191	314	79	7	n/a	713
Average number of grain unit trains held	This week	0	0	2	4	1	4	11
	Average over last 4 weeks	0	1	6	3	1	4	15
	Average of same 4 weeks last year	1	1	10	6	0	n/a	18
Total unfilled manifest grain car orders	This week	24	18	824	579	0	23	1,468
	Average over last 4 weeks	29	8	785	561	0	208	1,590
	Average of same 4 weeks last year	11	6	298	678	0	n/a	993

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 4/17/2026 (a); average over last 4 weeks (b); and average over same 4 weeks last year (c)

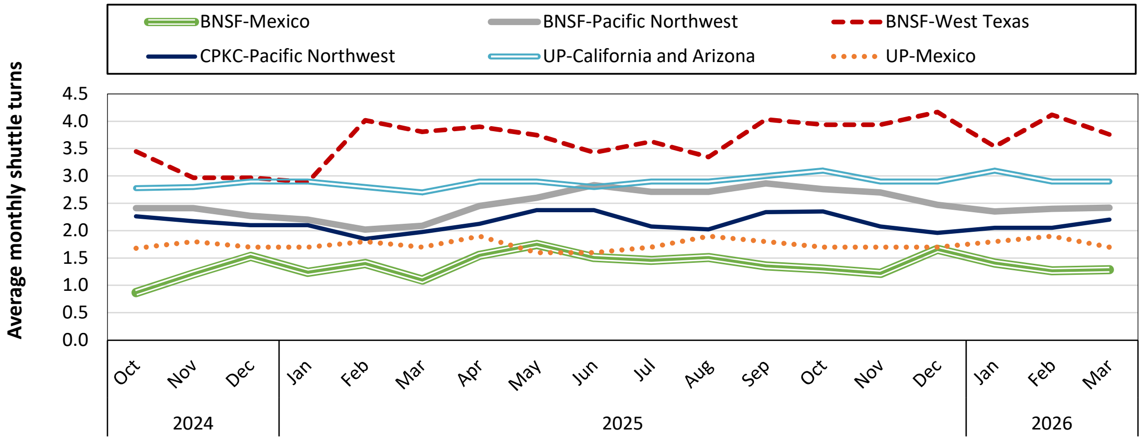






Note: Unfilled grain car orders for Kansas City Southern Railway (now part of Canadian Pacific Kansas City) are not included because those metrics are not reported at the State level.
Source: Surface Transportation Board. Map credits: Bing, GeoNames, Microsoft, TomTom.

Figure 5. Average monthly turns for grain shuttle trains, by railroad and region

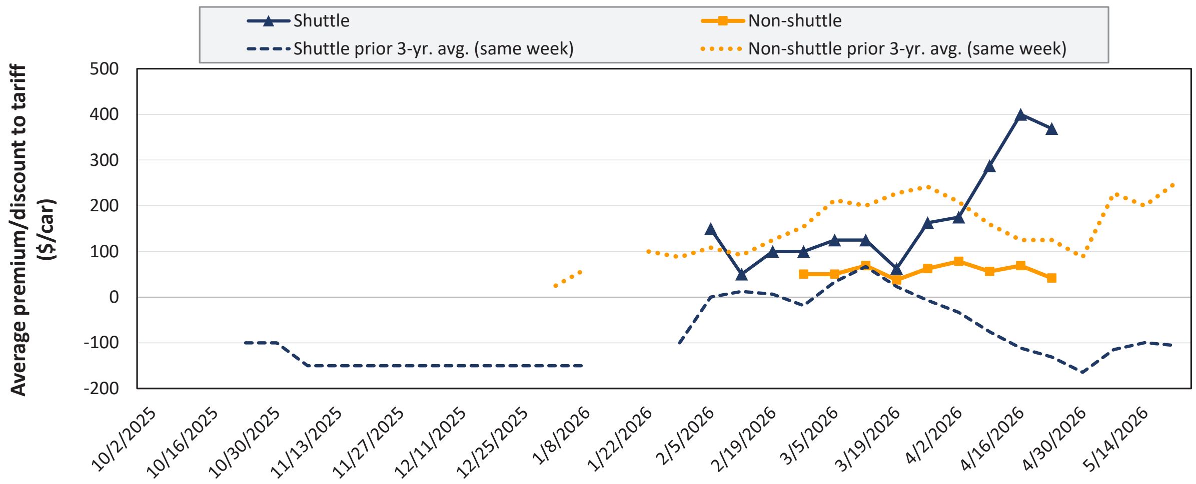


In March 2026, BNSF Railway's average monthly grain shuttle turns were 1.3 to Mexico, 2.4 to the Pacific Northwest, and 3.8 to West Texas. CPKC's shuttle turns averaged 2.2 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.7 to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



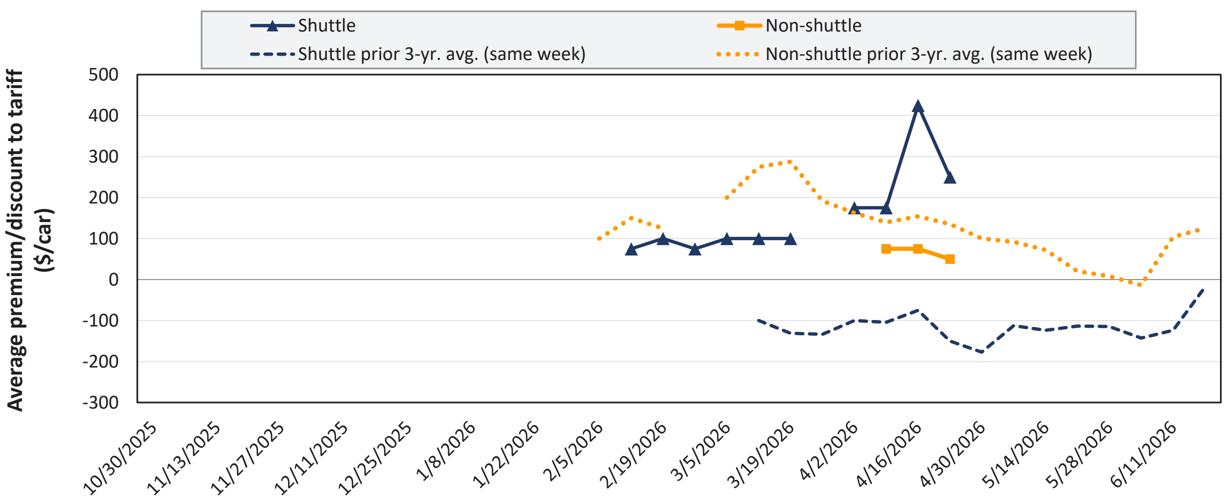
Average non-shuttle bids/offers fell $27 this week, and are $36 below the peak.

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

4/23/2026	BNSF	UP
Non-Shuttle	$33	$50
Shuttle	$600	$138

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 June 2026



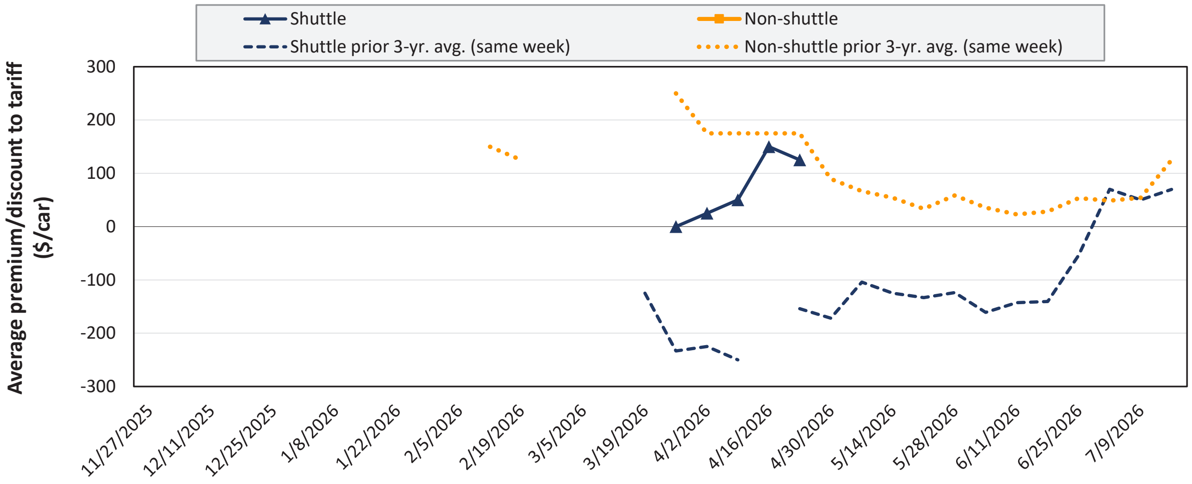
Average non-shuttle bids/offers fell $25 this week, and are $25 below the peak.

Average shuttle bids/offers fell $175 this week and are $175 below the peak.

4/23/2026	BNSF	UP
Non-Shuttle	$50	$50
Shuttle	$250	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.

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



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

Average shuttle bids/offers fell $25 this week and are $25 below the peak.

4/23/2026	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	$125	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: 4/23/2026		Delivery period					
		Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26
Non-shuttle	BNSF	n/a	33	50	n/a	n/a	n/a
	Change from last week	n/a	-17	0	n/a	n/a	n/a
	Change from same week 2025	n/a	-192	-50	n/a	n/a	n/a
	UP	n/a	50	50	n/a	n/a	n/a
	Change from last week	n/a	-38	-50	n/a	n/a	n/a
	Change from same week 2025	n/a	150	38	n/a	n/a	n/a
Shuttle	BNSF	1,175	600	250	125	50	n/a
	Change from last week	-125	-150	-175	-25	75	n/a
	Change from same week 2025	1,213	594	250	n/a	-50	n/a
	UP	300	138	n/a	n/a	n/a	n/a
	Change from last week	-150	88	n/a	n/a	n/a	n/a
	Change from same week 2025	544	350	n/a	n/a	n/a	n/a
	CPKC	n/a	125	100	100	n/a	n/a
	Change from last week	n/a	25	0	n/a	n/a	n/a
	Change from same week 2025	n/a	175	n/a	n/a	n/a	n/a

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

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

Table 6. Rail tariff rates for wheat shipments, 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
Hard red spring (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
Hard red winter (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. 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
	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
Soybeans	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

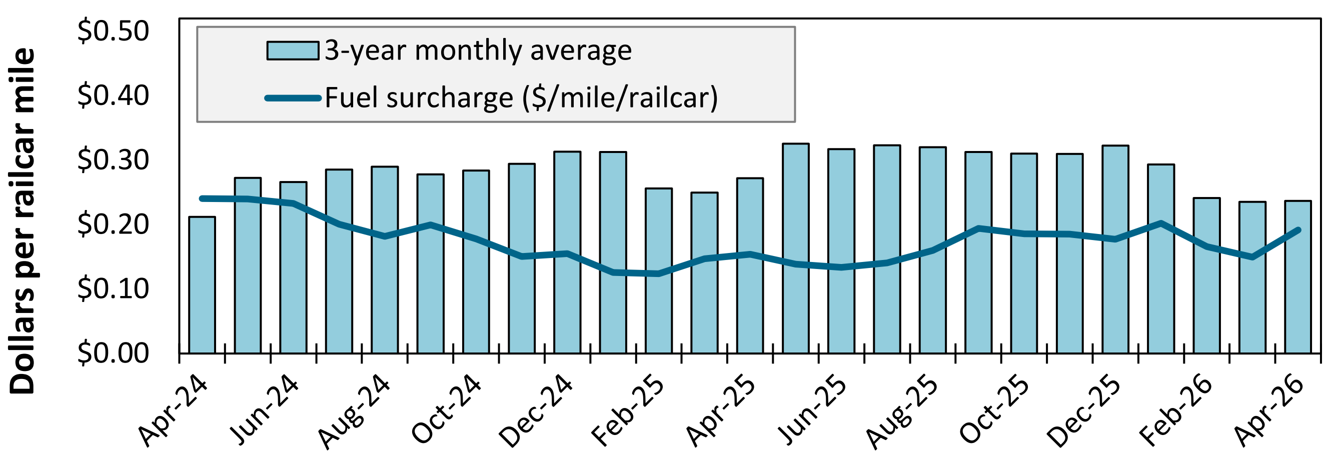
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage 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).

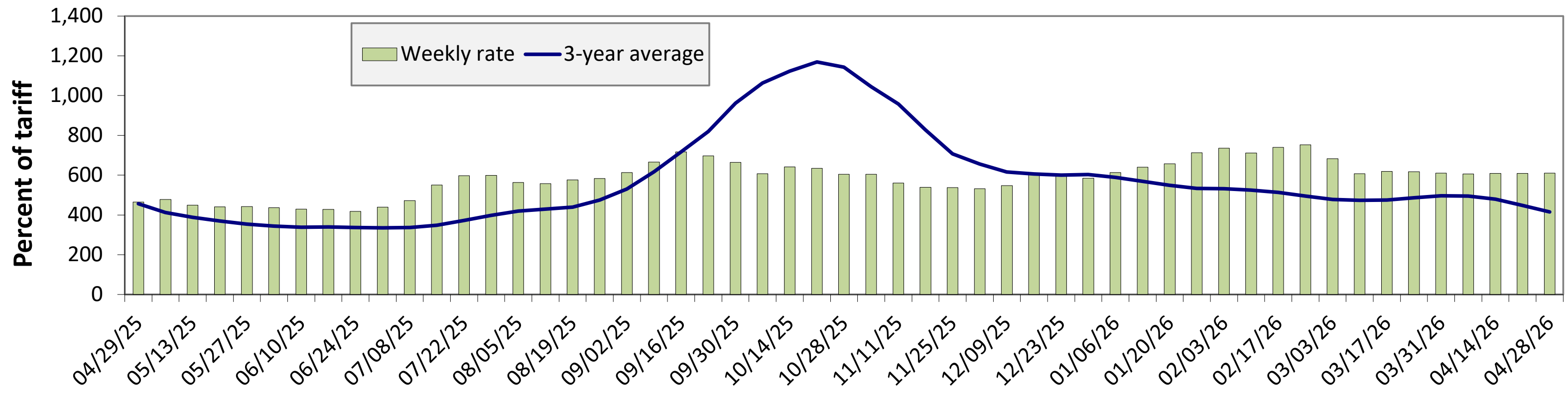
Figure 9. Railroad fuel surcharges, North American weighted average



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



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.

For the week ending April 28: there is no change from the previous week; 31 percent higher than last year; and 47 percent higher than the 3-year average.

Table 9. Weekly barge freight rates: southbound only

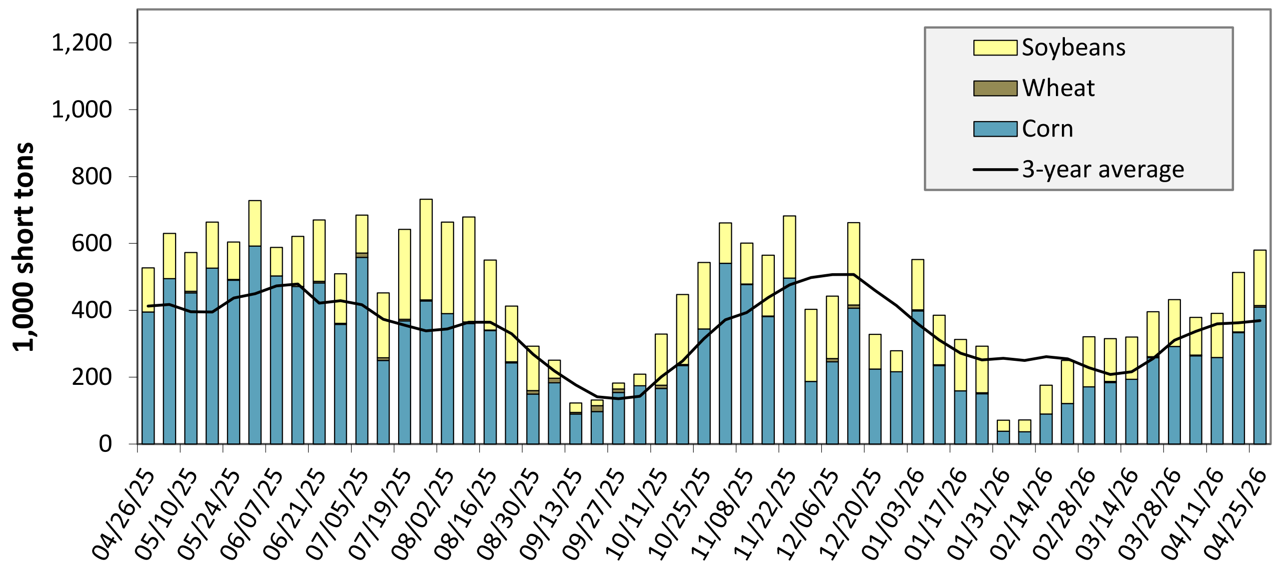
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	4/28/2026	695	616	610	455	449	379
	4/21/2026	716	635	609	454	478	369
$/ton	4/28/2026	43.02	32.77	28.30	18.15	21.06	11.90
	4/21/2026	44.32	33.78	28.26	18.11	22.42	11.59
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	30	25	31	30	31	25
	3-year avg.	44	37	47	49	37	38
Rate	May	686	609	603	445	444	366
	July	650	599	546	428	439	356

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 25: 10 percent higher than last year and 57 percent higher than the 3-year average.

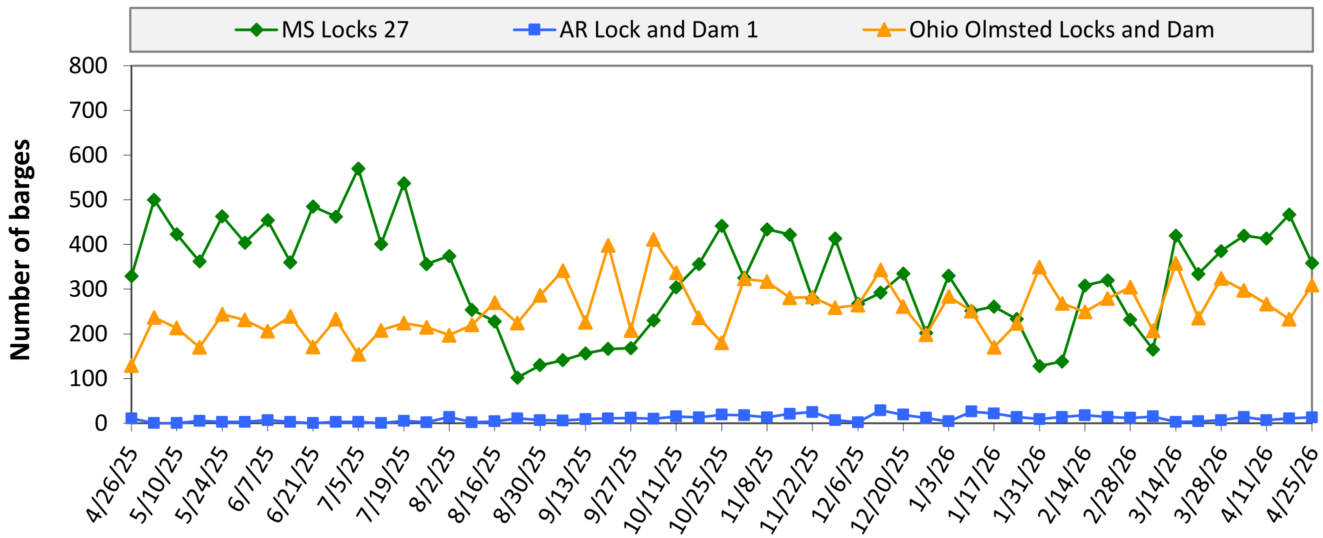
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 04/25/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	110	3	74	0	188
Mississippi River (Winfield, MO (L25))	221	5	134	0	360
Mississippi River (Alton, IL (L26))	411	5	170	0	586
Mississippi River (Granite City, IL (L27))	409	5	166	0	579
Illinois River (La Grange)	134	0	19	0	153
Ohio River (Olmsted)	19	0	25	0	44
Arkansas River (L1)	0	7	8	0	15
Weekly total - 2026	428	12	198	0	638
Weekly total - 2025	448	16	203	4	670
2026 YTD	4,688	278	3,356	28	8,350
2025 YTD	5,427	315	3,706	78	9,525
2026 as % of 2025 YTD	86	88	91	35	88
Last 4 weeks as % of 2025	112	104	127	0	116
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.

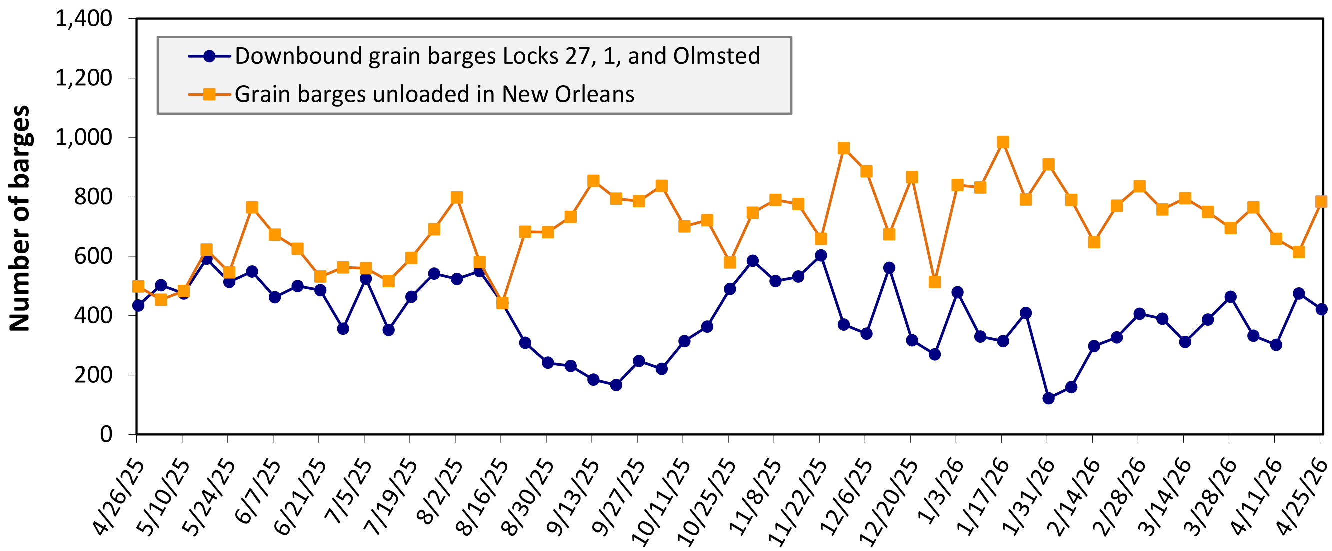
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending April 25: 680 barges transited the locks, 31 barges fewer than the previous week, and 34 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 25: 422 barges moved down river, 53 fewer than the previous week; 784 grain barges unloaded in the New Orleans Region, 28 percent more than the previous week.

Note: Olmsted = Olmsted Locks and Dam.
Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

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

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

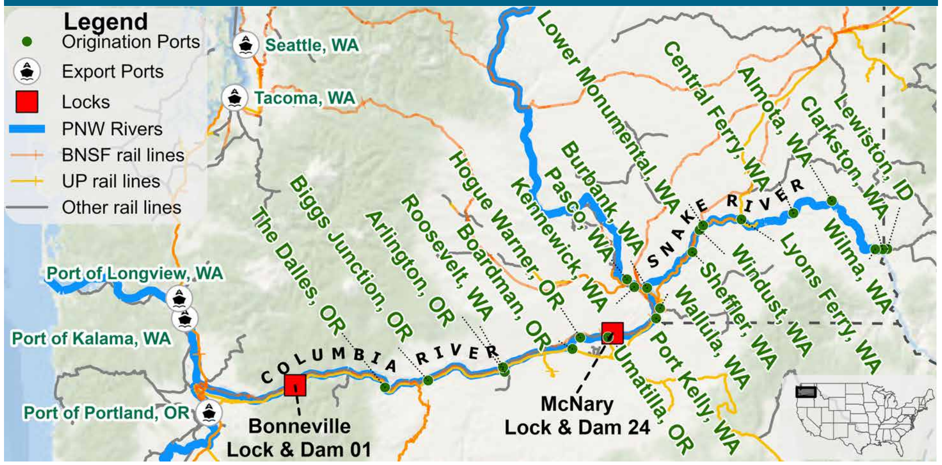
Note: Destination is Portland, OR, or Vancouver, WA; ton = 2,000 pounds; n/a = data not available.
Source: USDA, Agricultural Marketing Service.

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

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

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

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



Source: USDA, Agricultural Marketing Service.

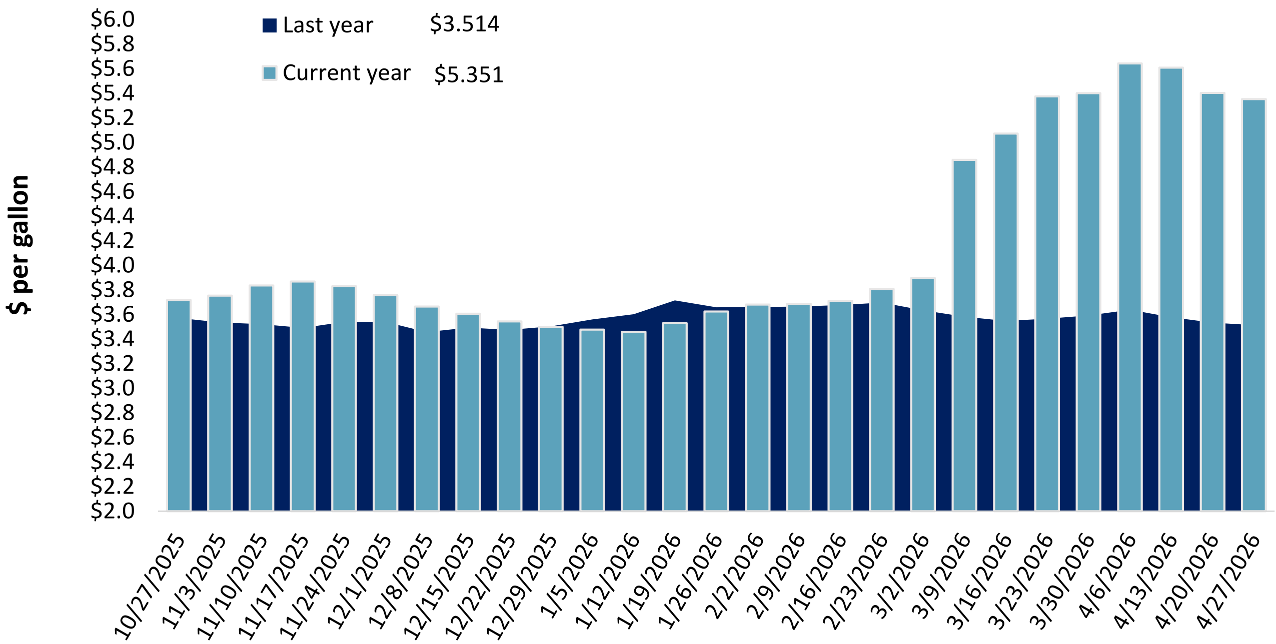
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 4/27/2026 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	5.425	-0.069	1.840
	New England	5.834	-0.028	1.926
	Central Atlantic	5.843	-0.081	2.037
	Lower Atlantic	5.229	-0.068	1.759
II	Midwest	5.131	-0.034	1.675
III	Gulf Coast	5.012	-0.057	1.829
IV	Rocky Mountain	5.270	0.057	1.800
V	West Coast	6.530	-0.090	2.306
	West Coast less California	5.926	-0.084	2.149
	California	7.228	-0.097	2.488
Total	United States	5.351	-0.052	1.837

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 27, the U.S. average diesel fuel price decreased 5.2 cents from the previous week to $5.351 per gallon, 183.7 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: Hard red winter (HRW)	Wheat: Soft red winter (SRW)	Wheat: Hard red spring (HRS)	Wheat: Soft white wheat (SWW)	Wheat: Durum	Wheat: All wheat	Corn	Soybeans	Total
Current unshipped (outstanding) export sales	For the week ending 4/23/2026	1,087	410	952	752	60	3,260	21,617	6,063	30,940
	This week year ago	922	316	774	746	28	2,785	16,965	4,135	23,885
	Last 4 wks. as % of same period 2024/25	122	143	140	119	359	131	130	161	135
Current shipped (cumulative) exports sales	2025/26 YTD	7,637	2,937	5,524	4,753	571	21,422	54,084	32,713	108,219
	2024/25 YTD	4,557	2,815	5,894	4,965	324	18,555	41,783	43,086	103,425
	YTD 2025/26 as % of 2024/25	168	104	94	96	176	115	129	76	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 4/23/2026	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	21,681	20,271	7	19,839
Japan	12,921	10,091	28	10,478
Colombia	6,462	6,057	7	5,493
China	0	33	-100	3,461
Korea	7,559	4,432	71	3,127
Top 5 importers	41,063	36,452	13	39,272
Total U.S. corn export sales	75,701	58,749	29	54,276
% of YTD current month’s export projection	90%	81%	-	-
Change from prior week	1,598	1,014	-	-
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 4/23/2026	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	11,735	22,478	-48	26,078
Mexico	4,629	4,504	3	4,762
Japan	1,905	1,733	10	2,107
Egypt	4,536	2,766	64	2,098
Indonesia	1,954	1,535	27	1,997
Top 5 importers	24,759	33,016	-25	37,042
Total U.S. soybean export sales	38,776	47,221	-18	48,941
% of YTD current month’s export projection	93%	92%	-	-
Change from prior week	258	371	-	-
Top 5 importers' share of U.S. soybean export sales	64%	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 4/23/2026	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	4,533	3,892	16	3,358
Philippines	2,898	2,613	11	2,473
Japan	2,244	2,110	6	2,045
China	336	139	142	1,137
Korea	1,884	2,391	-21	1,674
Taiwan	1,016	1,014	0	935
Thailand	660	950	-30	667
Nigeria	1,592	758	110	629
Indonesia	1,161	767	51	518
Colombia	725	502	45	489
Top 10 importers	17,049	15,136	13	13,926
Total U.S. wheat export sales	24,682	21,340	16	19,135
% of YTD current month’s export projection	101%	95%	-	-
Change from prior week	226	72	-	-
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.

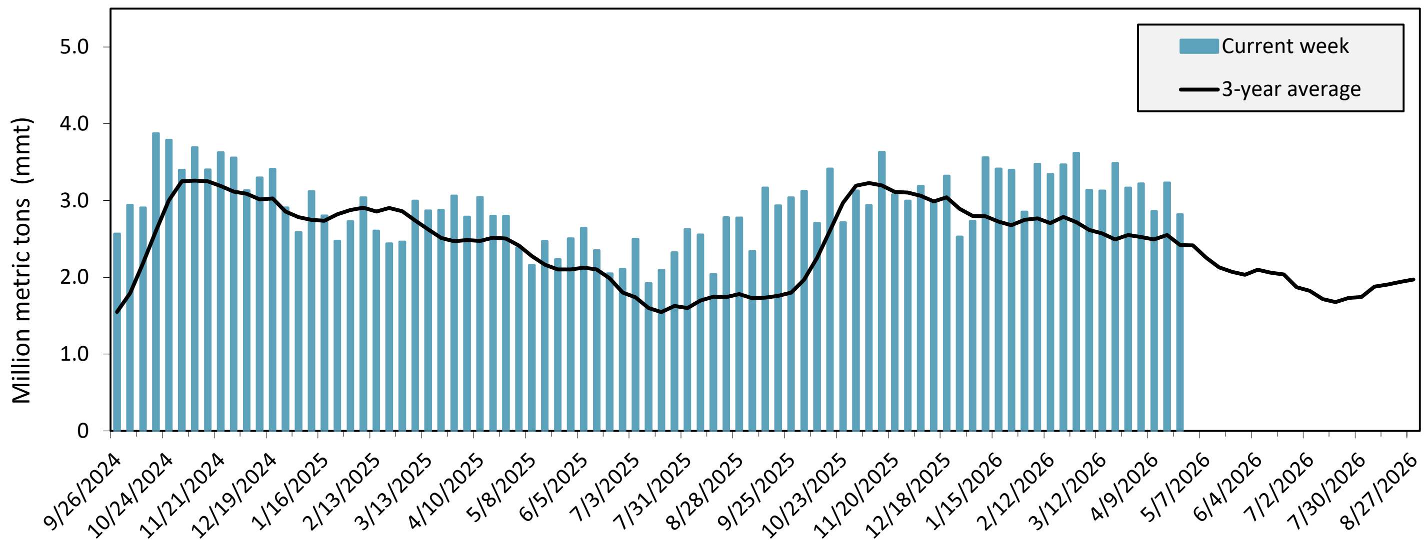
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 04/23/2026	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	386	572	67	7,993	8,112	99	81	110	24,214
	Soybeans	112	133	84	3,288	1,859	177	288	419	2,957
	Wheat	263	265	99	3,216	3,403	95	82	90	12,271
	All grain	760	980	78	14,508	13,463	108	93	117	39,721
Mississippi Gulf	Corn	838	768	109	12,399	12,026	103	118	129	37,115
	Soybeans	345	453	76	9,890	8,869	112	102	113	23,350
	Wheat	12	90	14	1,010	1,153	88	61	58	3,980
	All grain	1,195	1,311	91	23,299	22,047	106	109	118	64,484
Texas Gulf	Corn	92	0	n/a	522	105	498	n/a	910	590
	Soybeans	0	0	n/a	100	106	94	n/a	n/a	1,431
	Wheat	33	68	48	1,335	1,029	130	71	81	4,690
	All grain	292	248	118	4,564	1,324	345	299	209	7,774
Interior	Corn	274	343	80	5,028	4,007	125	99	116	15,546
	Soybeans	155	116	134	2,304	2,166	106	96	120	7,712
	Wheat	37	74	50	936	904	104	106	118	3,104
	All grain	479	556	86	8,426	7,222	117	98	118	26,887
Great Lakes	Corn	19	42	46	84	0	n/a	n/a	n/a	414
	Soybeans	12	0	n/a	12	0	n/a	n/a	134	63
	Wheat	20	21	94	63	55	115	125	124	434
	All grain	51	63	82	159	55	291	420	327	911
Atlantic	Corn	36	19	191	553	124	448	281	332	607
	Soybeans	5	55	9	408	429	95	989	547	1,085
	Wheat	0	0	n/a	0	27	0	0	0	81
	All grain	41	74	55	961	580	166	342	382	1,773
All Regions	Corn	1,644	1,743	94	26,579	24,372	109	106	126	78,486
	Soybeans	629	757	83	16,406	13,532	121	123	142	36,851
	Wheat	365	518	70	6,560	6,570	100	78	85	24,560
	All grain	2,819	3,231	87	52,322	44,795	117	110	125	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.

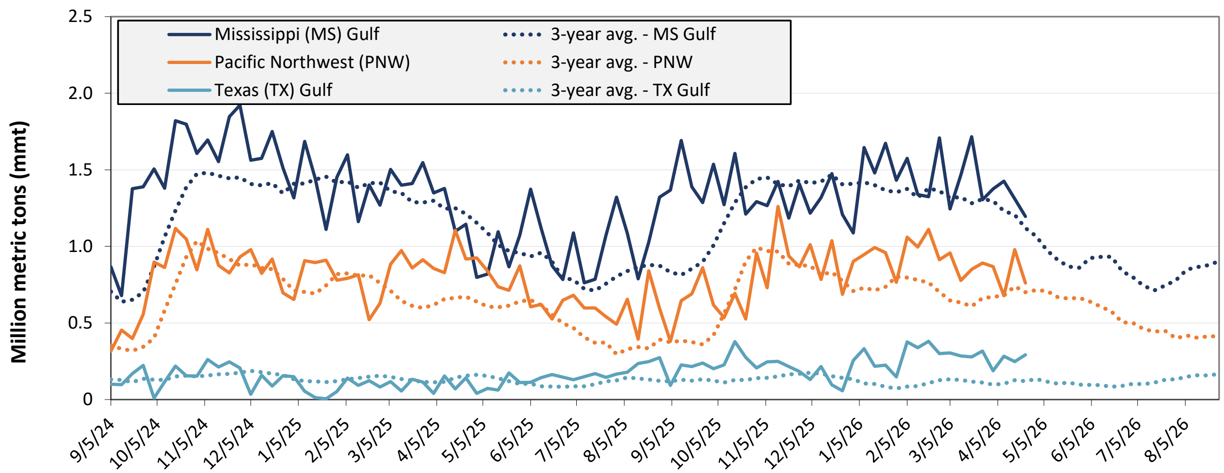
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending April 23: 2.8 mmt of grain inspected, down 13 percent from the previous week, up 11 percent from the same week last year, and up 16 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)



Source: USDA, Federal Grain Inspection Service.

Week ending 04/23/26 inspections (mmt):
MS Gulf: 1.2
PNW: 0.76
TX Gulf: 0.29

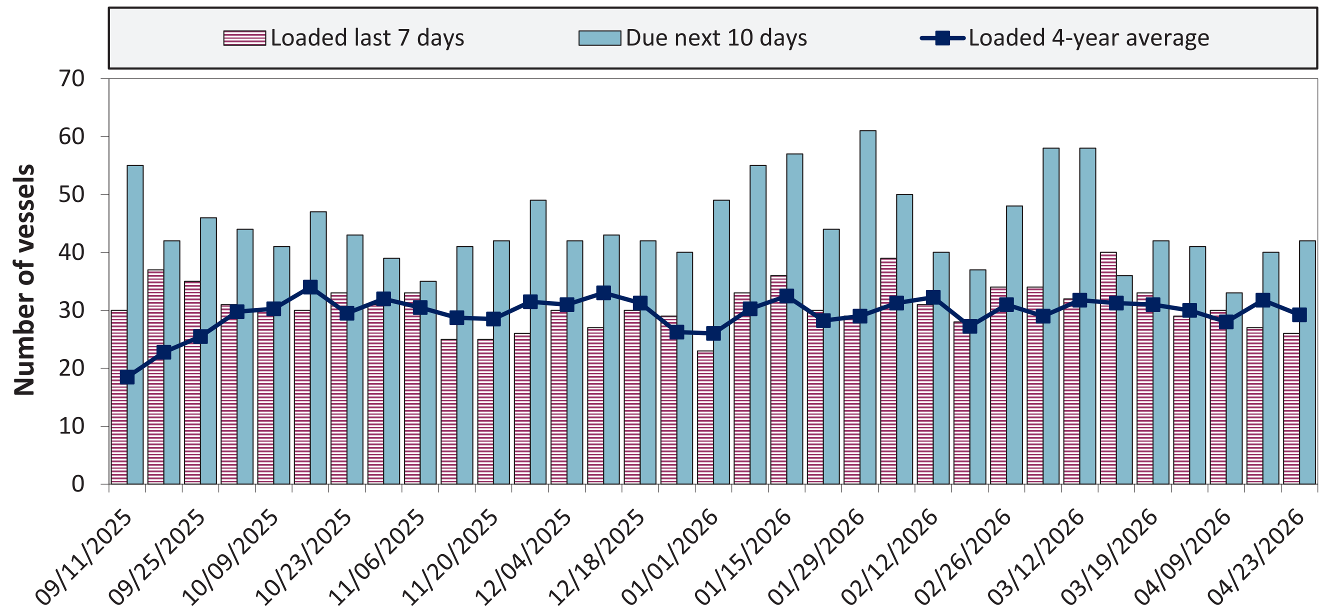
Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 9	up 18	down 5	down 22
Last year (same 7 days)	up 18	up 295	up 36	down 15
3-year average (4-week moving average)	up 7	up 142	up 20	up 9

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
4/23/2026	19	26	42	20
4/16/2026	22	27	40	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.

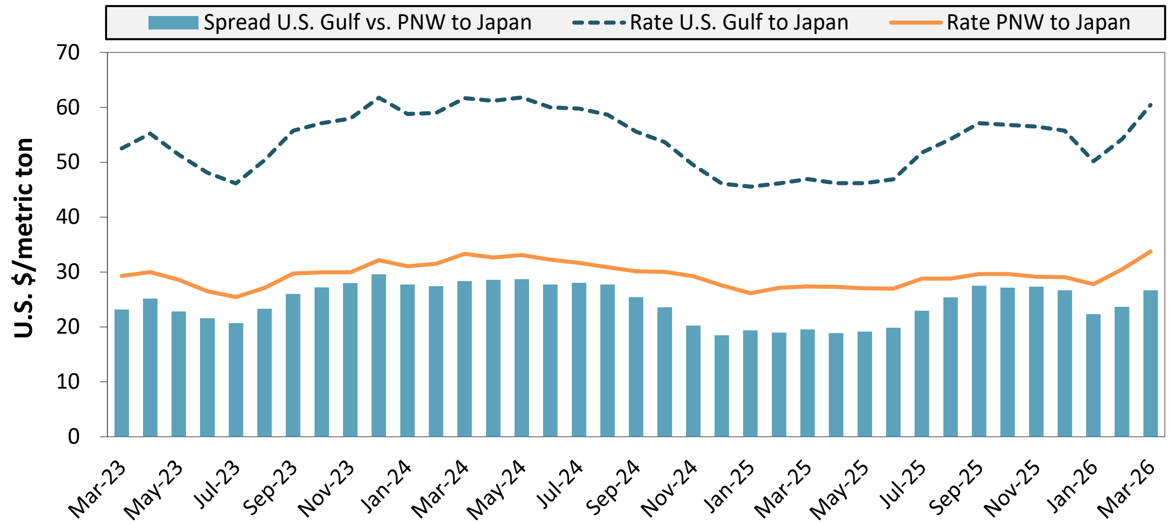
Figure 19. U.S. Gulf vessel loading activity



Week ending 04/23/26, number of vessels	Loaded	Due
Change from last year	4%	56%
Change from 4-year average	-11%	22%

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



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%

Note: PNW = Pacific Northwest
Source: O'Neil Commodity Consulting /World Perspectives, Inc.

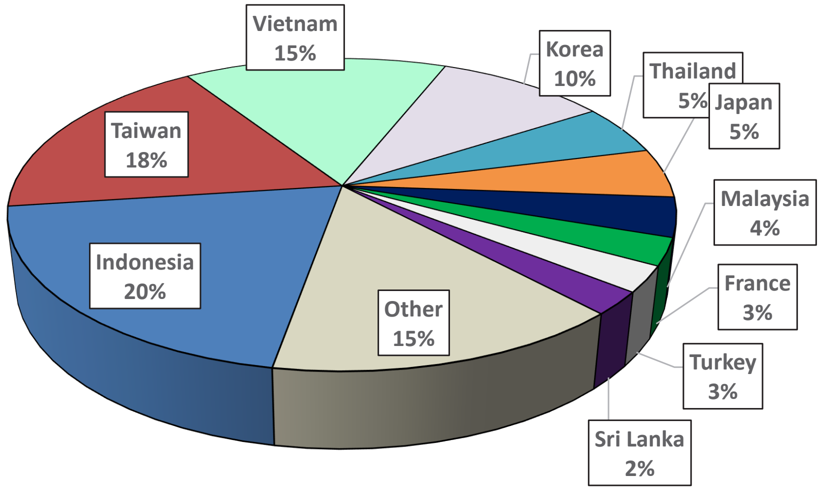
Table 20. Ocean freight rates for selected shipments, week ending 04/25/2026

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	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	Thailand	Soybean	Apr 23, 2026	Jun 1/20, 2026	60,000	45.00
Brazil	Vietnam	Heavy grain	Mar 25, 2026	Apr 20/30, 2026	65,000	63.00

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

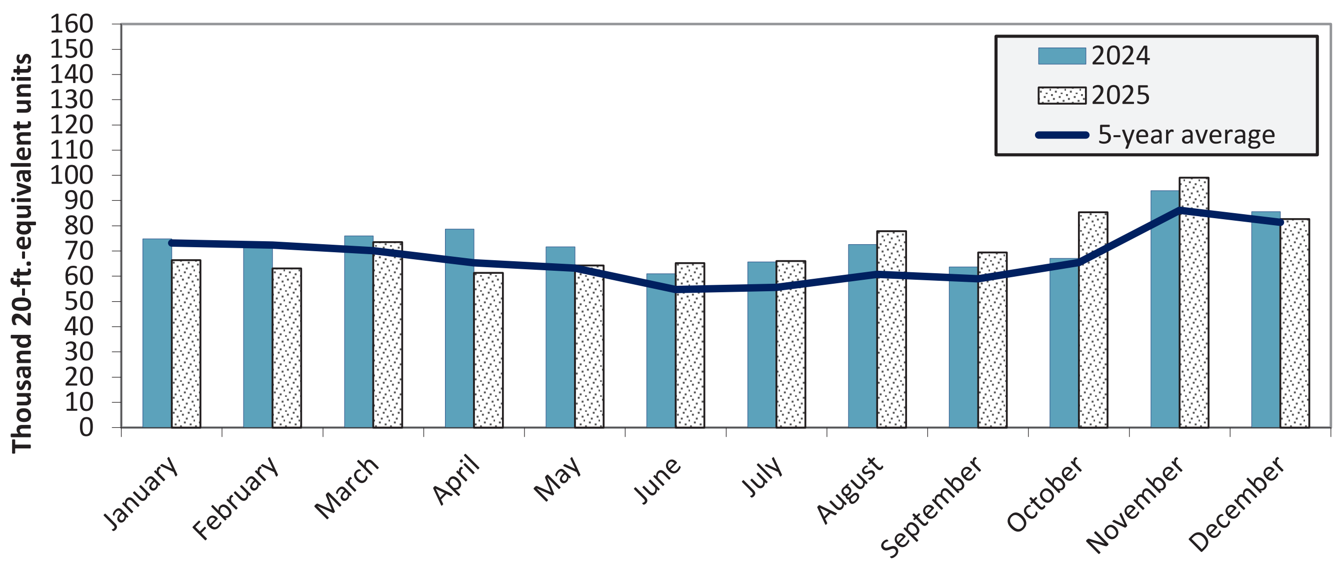
In 2025, containers were used to transport 11 percent of total U.S. waterborne grain exports. Approximately 48 percent of U.S. waterborne grain exports in 2025 went to Asia, of which 19 percent were moved in containers. Approximately 83 percent of U.S. waterborne containerized grain exports were destined for Asia.

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



Note: The following harmonized tariff codes are used to calculate containerized grains movements: 1001, 100190, 100199, 100119, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 100790, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, 230400, and 230990.
Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

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



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

Note: ft. = foot. The following harmonized tariff codes are used to calculate containerized grains movements: 1001, 100190, 100199, 100119, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 100790, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, 230400, and 230990.
Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

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

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