



Grain Transportation Report

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Updated MY 2026/27 HRW Wheat Rail Rates Take Effect.

As reported in the [May 14, 2026 Grain Transportation Report \(GTR\)](#), railroads have, in some cases, set revised rates for hard red winter (HRW) wheat—now incorporated in [GTR tables 6](#) and [8](#). For the new wheat marketing year (MY 2026/27) begun on June 1, tariff rate changes are minor compared to last year's significant cuts.

BNSF Railway (BNSF) reduced some HRW shuttle rates to the Texas Gulf by \$200-\$400 per car—e.g., a \$200-per-car decline from Enid, OK, to Houston, TX—while other rates, such as those from major Kansas terminals (i.e., Hutchinson, Salina, and Wichita), did not change. BNSF also lowered shuttle rates to the U.S.-Mexico border—e.g., by \$200 per car from major Kansas terminals to El Paso, TX. Union Pacific Railroad (UP) kept its HRW export rates to the Texas Gulf and Mexico largely unchanged but raised rates for eastbound lanes by \$100 per car.

MY 2026/27 begins with HRW wheat production projected at its lowest level since MY 1957/58 because of drought and late-season freezes. However, transportation demand will benefit from high carryover stocks from MY 2025/26. BNSF currently holds a price advantage over UP in nearly all competitive lanes originating from major Kansas terminals.



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Rail Fuel Surcharges Increase in June.

Effective this month, Class I railroads' mileage-based fuel surcharges rose. From May to June, the weighted average fuel surcharge increased by \$0.13 per car-mile, to \$0.54 per car-mile ([GTR fig. 9](#)). This value is up \$0.41 from last June and is the highest since August 2022. The June increase follows a \$0.22 increase from April to May, the largest month-to-month increase in the GTR figure 9 series history ([GTR May 7, 2026](#)).

Additionally, effective June 5, [CSX Transportation \(CSX\) reinstated](#) fuel surcharges on its public tariff traffic, marking the first time the surcharge has applied to these rates since December 2021. CSX's June fuel surcharge is \$0.44 per car-mile. From Haw Creek siding (near Ladoga, IN), to Ozark, AL—a 708-mile route—the surcharge adds \$312 per car, a 5-percent increase on top of the base tariff rate.

July's fuel surcharges are likely to be similar to June's because most Class I railroads base their fuel surcharge on the [U.S. average diesel price](#) from 2 months prior ([GTR fig. 16](#)). Because of this lag, July's rail fuel surcharges will be based on May's diesel prices. May's average diesel price (\$5.60 per gallon) was up \$0.10 from April. This increase is significantly smaller than the February-March increase (\$1.20 per gallon) and the March-April increase (\$0.58 per gallon).



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Grain Elevator Doubles Storage Capacity in South Carolina.

In a recently completed multimillion-dollar expansion project, the South Carolina Farm Bureau Marketing Association has [nearly doubled the storage capacity](#) of its grain elevator in Anderson, SC—to 610,000 bushels. The expansion adds three 90,000-bushel grain bins; a 2,000-bushel grain dryer; a 25,000-bushel wet tank; an unloading pit; and two load-out bins.

The expansion is intended to help offset challenges facing South Carolina farmers, including the recent closure of the State's only soybean processing facility. Critically important for area farmers, the grain elevator is the only one within a 100-mile radius. With the completed expansion, the Anderson facility will serve nine more counties (across the State) in addition to the 13 upstate counties it currently serves.

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 May 28, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2025/26 totaled 23.90 million metric tons (mmt), down 8 percent from last week and up 22 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26 were 0.88 mmt, down 13 percent from last week. Net [soybean export sales](#) were 0.28 mmt, down 8 percent from last week. Net [wheat export sales](#) were -0.64 mmt, up 20 percent from last week.

Rail

U.S. Class I railroads originated 28,556 [grain carloads](#) during the week ending May 23. This was a 2-percent decrease from the previous week, 18 percent more than last year, and 25 percent more than the 3-year average.

Average June [shuttle secondary railcar bids/offers](#) (per car) were \$263 above tariff for the week ending May 28. This was \$50 less than last week and \$347 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$44 above tariff. This was \$6 more than last week and \$63 more than this week last year.

Barge

For the week ending May 30, [barged grain movements](#) totaled 608,450 tons. This was 14 percent less than the previous week and 29 percent less than the same week last year.

For the week ending May 30, 404 [barges moved down river](#), 51 fewer than the previous week. There were 605 grain barges unloaded in the New Orleans region, 7 percent more than the previous week.

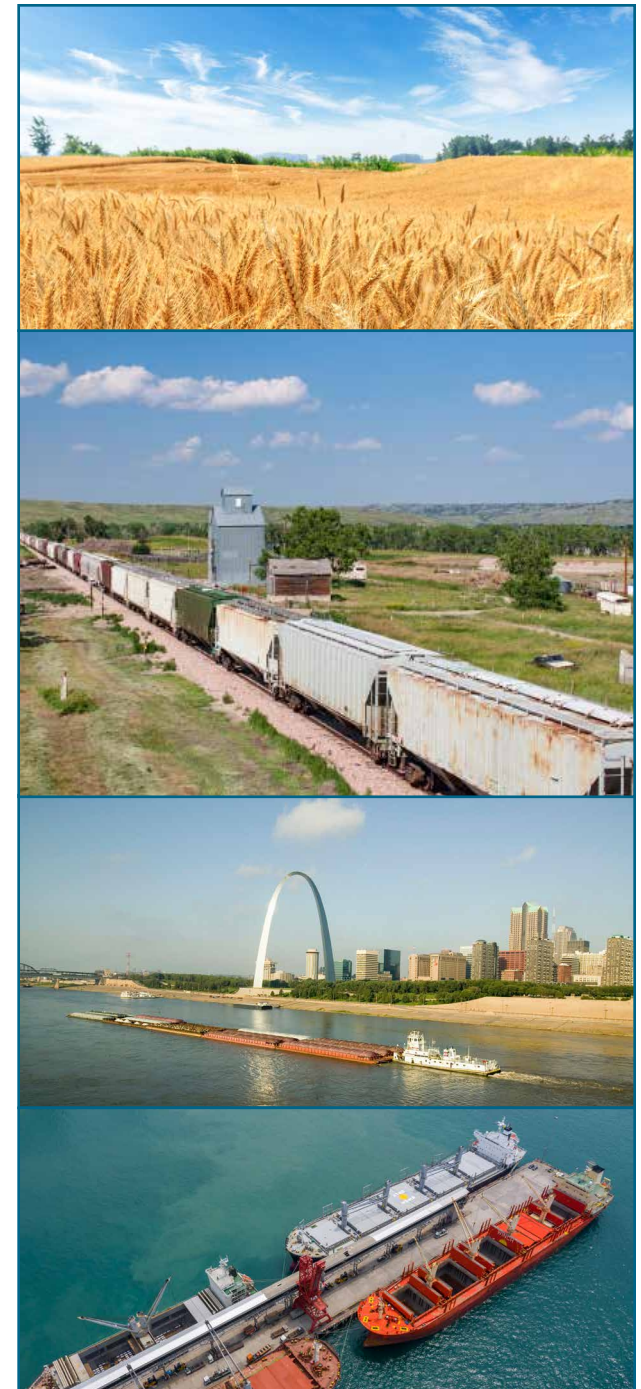
Ocean

For the week ending May 28, 21 [oceangoing grain vessels](#) were loaded in the Gulf—13 percent fewer than the same period last year. Within the next 10 days (starting May 29), 40 vessels were expected to be loaded—7 percent fewer than the same period last year.

As of May 28, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$72.25, up 2 percent from the previous week. The rate from the Pacific Northwest to Japan was \$37.25 per mt, unchanged from the previous week.

Fuel

For the week ending June 1, the [U.S. average diesel fuel price](#) decreased 17.3 cents from the previous week to \$5.35 per gallon, 189.9 cents above the same week last year.



National Freight Plan Underscores Importance of Efficient, Resilient Grain Transportation

Released on May 18, the [2026 National Freight Strategic Plan](#) (NFSP, or Plan) of the [U.S. Department of Transportation \(DOT\)](#) establishes a coordinated national framework to strengthen the U.S. freight system. The NFSP's content reflects a recognition that agricultural transportation—driven by massive grain volumes—is one of the U.S. freight system's largest sectors.

This article starts with a look at the NFSP's purview, then recounts the central agricultural facts covered in the Plan, and concludes by relating two of the Plan's strategic goals to the grain transportation system. Throughout, the article highlights the NFSP's aspects most relevant to grain transportation.

What Is the NFSP?

In essence, the NFSP is a comprehensive Federal roadmap for modernizing the transportation systems that sustain the U.S. economy. Requiring an update every 5 years, the Plan serves as a long-term, multimodal strategy to align Federal freight programs, investments, research, and regulatory activities. As part of this vision, the Plan also supports State, local, Tribal, and private-sector efforts to improve how goods move across the country.

In practice, DOT uses the NFSP to inform infrastructure planning, coordinate billions of dollars in investments, and build strong

partnerships across multiple jurisdictions and transportation modes. Building on the inaugural [2020 Plan](#), the 2026 edition offers data-driven insights into national trends and provides a clear framework State and local agencies can use to optimize their own freight planning processes.

The 145-page Plan is organized into four main parts: Part 1 breaks down the U.S. freight network's current characteristics and challenges across multiple modes—including highways, railways, and inland waterways. Part 2 outlines forecasted freight movements and critical commerce corridors for four key economic sectors, including a dedicated look at agriculture. Part 3 assesses the various barriers—ranging from regulatory to financial to technological—that currently hinder freight performance. Finally, Part 4 lays out the strategic framework and specific strategies DOT will use to achieve its long-term goals for the national freight system.

NFSP Highlights Agriculture's Dependence on Critical Corridors

According to the NFSP—in 2025, trucks moved 2.2 billion tons of agricultural products; rail, 265 million tons; and barge, 126 million tons. At the same time, the NFSP recognized that agricultural freight depends heavily on a

relatively small set of high-volume corridors and gateways that connect production regions to domestic and export markets ([see fig. 27 of the Plan](#)).

For grain exports, the NFSP emphasized the importance of the inland waterways and rail networks. Almost 60 percent of U.S. grain exports (primarily corn and soybeans) travel by barge on the Mississippi River System to Gulf elevators, while 60 percent of U.S. wheat exports pass through the Columbia-Snake River System in the Pacific Northwest. Class I railroads originate 24 percent of U.S. grain shipments and 39 percent of grain export movements.

Weather and Harvest Impacts. The Plan warned that weather variability severely impacts grain logistics for inland waterways—corridors on which grain transportation relies heavily. For instance, low-water on the Mississippi River (in 2022) forced barges to light-load, reducing capacity by up to 27 percent and causing a spike in barge rates. Additionally, the NFSP noted that seasonal surges from the fall corn and soybean harvests strain both rural roads and barge availability, raising transportation costs and increasing the risk of accidents on narrow, two-lane highways.

Given grain's heavy use of the inland waterway system, the NFSP also noted the importance of grain exports to inland waterway funding,

through the Inland Waterways Trust Fund. The Plan concluded that “coordinated, multistate investments by groups such as the Corn Belt Port Authority and others support growth in waterborne agricultural commodities like soy and corn...and help to generate revenues that contribute to inland waterway quality.”

Shifting Freight Patterns. The NFSP found that agricultural freight patterns are changing as a result of growth in domestic soybean crush capacity and growth in domestic use of soybeans and soybean byproducts. Domestic crush capacity is expected to increase from 2.4 billion bushels in 2024 to 2.9 billion bushels by 2027 ([see fig. 28 of the Plan](#)). Increases in domestic crush would require more inbound truck and rail movements of soybeans into the Midwestern and Plains processing clusters, and more truck and rail movements of meal, oil, and co-products to domestic feed mills and export terminals. More domestic crush would also result in fewer long-distance rail shipments of soybeans straight to export.

The NFSP concluded its section on agriculture by noting the role of rural roads and small bridges in providing the first- and last-mile of the agricultural supply chain. DOT’s [Rural Opportunities to Use Transportation for Economic Success \(ROUTES\) program](#) addresses rural transportation needs via technical assistance and tools that help connect rural communities with funding, financing, and outreach resources that help improve infrastructure.

NFSP Seeks To Improve Transportation Efficiency and Resilience

Of the Plan’s six strategic goals, this article focuses on the efficiency and resilience goals and their connections to grain transportation. The goals capture the core outcomes the Plan seeks to advance over the next 5 years and reflect the most significant challenges and opportunities identified in creating the Plan.

Efficiency: Reduce Bottlenecks and Improve Freight Flow. An efficient freight system enables predictable, reliable movement of goods that supports economic growth and competitiveness. DOT’s efficiency strategy focuses on relieving the worst congestion and bottlenecks; improving real-time shipment visibility to better use existing freight infrastructure; streamlining Federal processes for freight projects; and integrating multimodal planning.

The NFSP emphasizes the need to reduce delays at nationally significant bottlenecks, which act as a recurring surcharge on the cost of moving goods. For example, DOT observed that an extended closure at a major lock can trigger massive diversions, forcing thousands of truck trips onto the highway network and adding over \$1 billion in shipper costs. Additionally, rural first-mile/last-mile infrastructure constraints, such as weight-restricted bridges and narrow two-lane roads, force detours in rural areas and add time and

cost to grain and other agricultural shipments. To better use existing infrastructure, the Plan emphasizes the need for improved real-time shipment visibility. For example, the [Freight Logistics Optimization Works \(FLOW\) initiative](#) provides a secure dashboard for participants to view near-term demand and asset availability, up to 90 days out. Though currently focused on containerized imports, DOT plans to expand FLOW’s data coverage to exports and bulk cargo. Such data help ports, shippers, and carriers anticipate volumes, optimize operations, and align equipment.

To streamline modal interfaces (e.g., ports, rail terminals, and border crossings), the Plan encourages integrated multimodal freight planning and investment. DOT will promote investments that consider end-to-end freight performance, to maximize overall system efficiency, rather than just shifting congestion or delays from one mode or location to another. Toward this aim, DOT will support multi-State coalitions, regional compacts, and corridor studies. Multimodal, multijurisdictional integration is vital for agriculture, which depends on seamless connections among truck, rail, and barge to reach domestic and global markets.

Measures of progress toward a more efficient national freight system will track trends in the reliability of trucks’ travel time, truck delays at key bottlenecks, and dwell time and delays at key freight nodes.

Resilience: Keep Freight Moving During Disruptions. *Resilience*, according to the NFSP, requires identifying critical vulnerabilities, bolstering the freight system's redundancies, analyzing risk in planning and investment, and boosting preparedness and recovery.

Resilience includes mitigating single points of failure in the freight network and increasing redundancy and rerouting capabilities. Toward this end, the NFSP highlighted the need to maintain inland waterway channel depths and widths and to make locks and dams more reliable. According to the Plan, as of 2024, 80 percent of all navigable lock and dam structures on the inland waterways system had exceeded their designed life, risking unreliability and unplanned closures.

The Plan estimated that, in recent years, each dollar invested in inland waterways returned \$1.39 to \$1.83 in economic benefits—in part because these investments shifted traffic away from congested highways. The NFSP also noted the importance of rail and highway access as multimodal backups during disruptions.

Another objective under Resilience integrates risk analysis into freight planning and investment. Along these lines, noting inland waterways' susceptibility to weather impacts, the Plan emphasized the need for direct funding (from the U.S. Army Corps of Engineers and other public agencies) to keep river segments navigable during a wider range of weather conditions. These resilience efforts are supported by Federal competitive grant programs, such as the [Port Infrastructure Development Program](#).

Measures of progress toward a more resilient national freight system will track trends in unscheduled closures, recovery time after disruptions, demonstrated use of redundancy during disruptions, and the consideration of resilience into freight planning.

Conclusion

The NFSP's purview and recommendations reflect the knowledge that grain and agricultural shipping—one of transportation's largest sectors—depends on an efficient and

resilient national freight system. The NFSP estimates that agricultural freight will grow about 1.5 percent annually over the next two decades. From 2025 to 2050, DOT projects the following increases in agriculture's modal tonnages: trucking, 44 percent; rail, 50 percent; and barge/waterways, 49 percent.

The NFSP provides the Federal roadmap for modernizing infrastructure, enhancing efficiency, and improving reliability over the next 5 years. Awareness of the NFSP can help grain industry stakeholders more effectively seek Federal funding and participate in the decision-making process surrounding national freight strategy. Effective stakeholder participation will drive upgrades and new construction of rural roads, waterways infrastructure, shortline railroads, and ports. Ultimately, effective stakeholder engagement ensures the freight system can efficiently meet grain transportation demand in the years to come.

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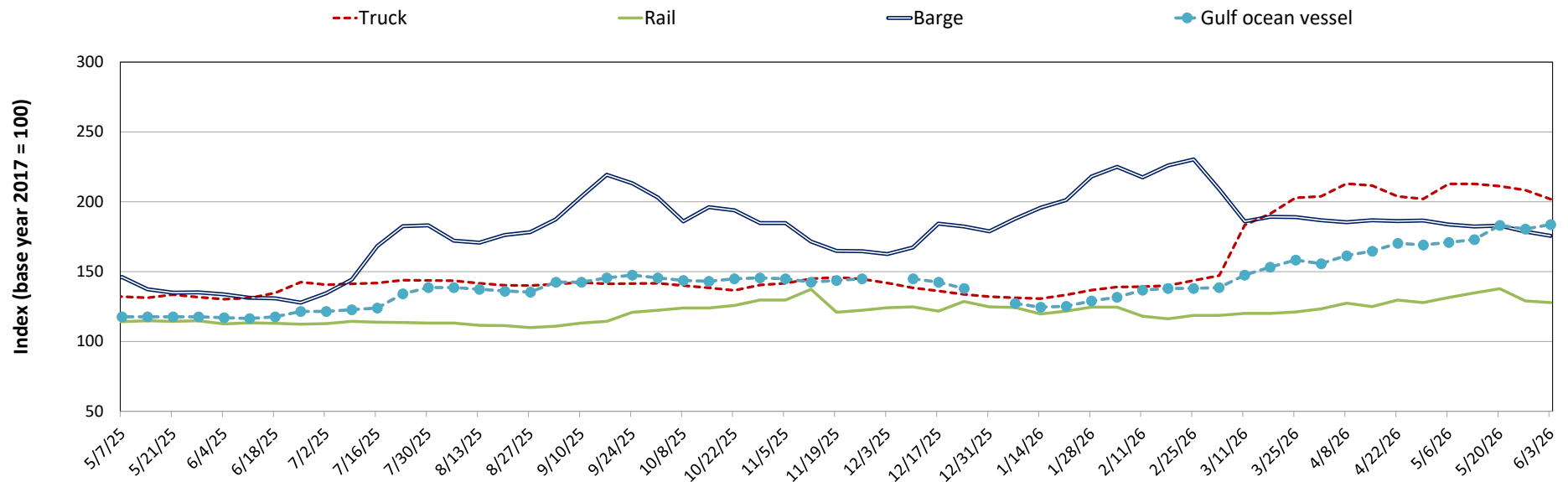
Grains are transported to the domestic and international markets via one or more of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
06/03/26	202	128	176	184	177
05/27/26	208	129	179	181	177
06/04/25	130	112	134	117	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.

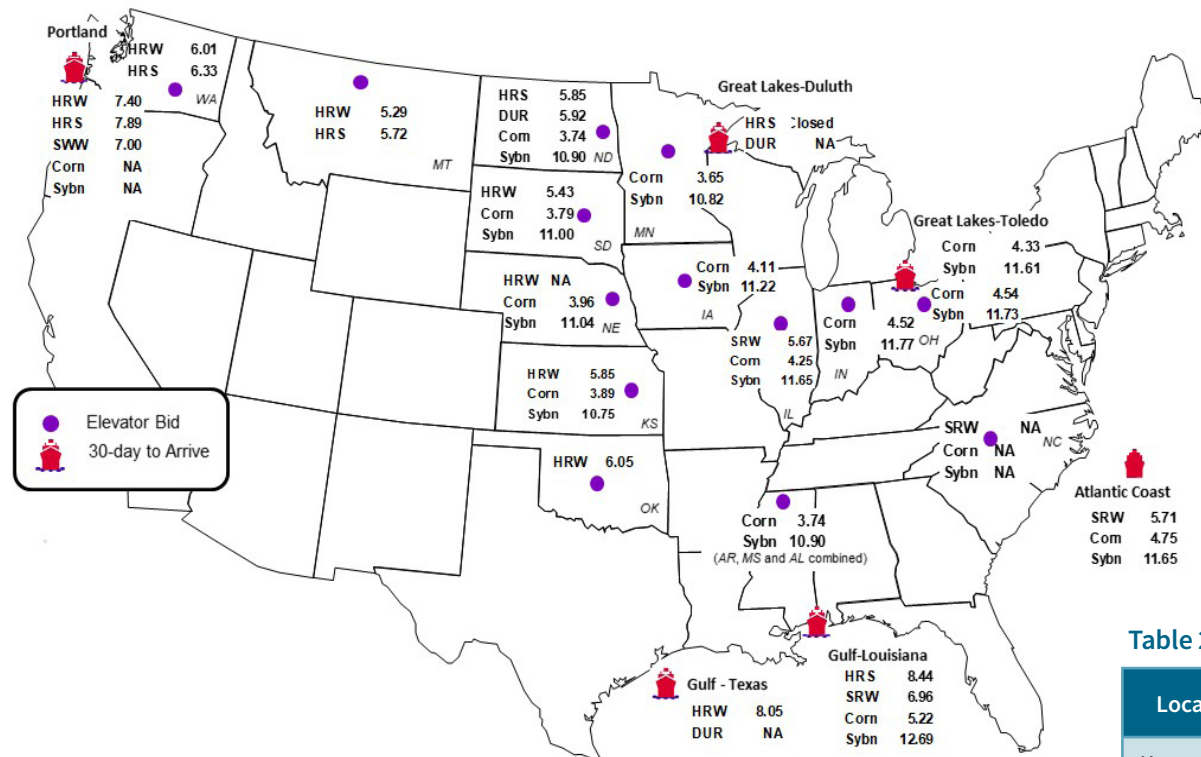
Figure 1. Grain transportation cost indicators as of week ending 06/03/26



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 SSW, #2 Y Corn, #1 Y Soybeans
 Export bids: Ord HRW, 14% HRS, #2 SRW, #2 DUR, #2 SSW, #2 Y Corn, #1 Soybeans
 Note: HRW = Hard red winter wheat, HRS = Hard red spring wheat, SRW = Soft red winter wheat, DUR = Durum, SSW = 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	5/29/2026	5/22/2026
Corn	IL-Gulf	-0.97	-1.04
Corn	NE-Gulf	-1.26	-1.35
Soybean	IA-Gulf	-1.47	-1.47
HRW	KS-Gulf	-2.20	-2.17
HRS	ND-Portland	-2.04	-2.01

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	5/29/2026	Week ago 5/22/2026	Year ago 5/30/2025
Kansas City	Wheat	July	6.496	6.820	5.334
Minneapolis	Wheat	July	6.638	6.895	6.254
Chicago	Wheat	July	6.106	6.462	5.340
Chicago	Corn	July	4.466	4.632	4.440
Chicago	Soybean	July	11.868	11.962	10.416

Sources: Chicago Mercantile Exchange (CME), Group Grain, and *Oilseed Futures Report*.

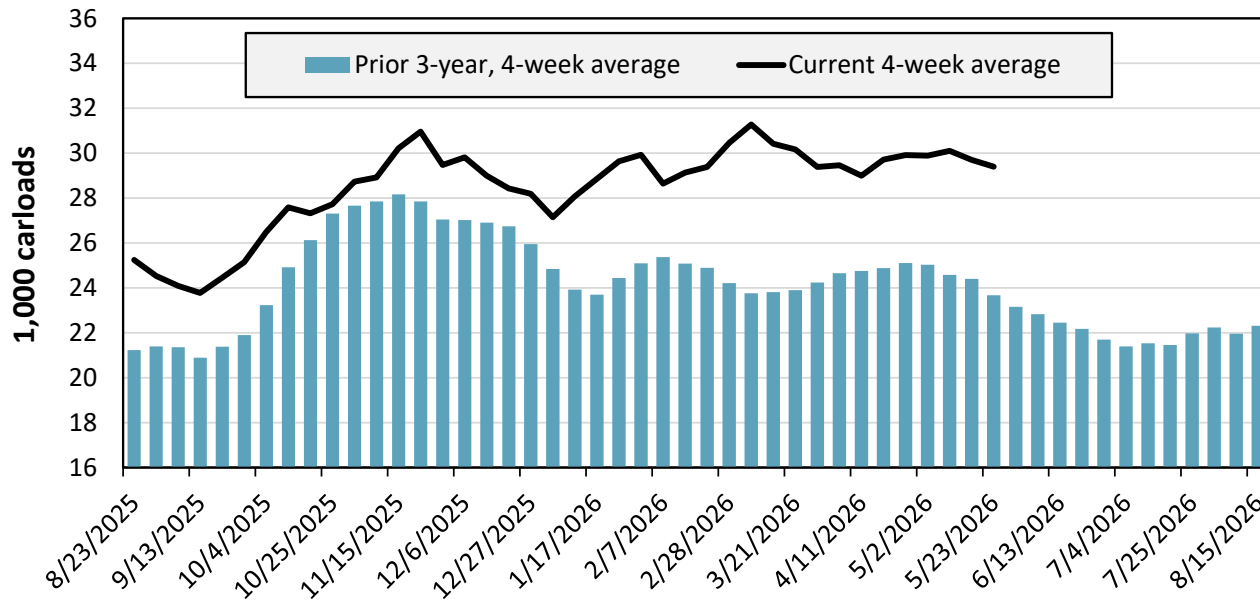
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 5/23/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,328	2,236	13,063	6,524	3,792	1,613	28,556
This week last year	1,937	2,511	9,907	5,805	2,965	1,077	24,202
2026 YTD	30,327	52,763	264,334	141,221	72,101	35,556	596,302
2025 YTD	35,014	60,280	230,371	121,210	54,330	29,034	530,239
2026 YTD as % of 2025 YTD	87	88	115	117	133	122	112
Last 4 weeks as % of 2025	87	88	123	121	130	124	117
Last 4 weeks as % of 3-yr. avg.	87	90	131	125	145	155	124
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 May 23, grain carloads were down 1 percent from the previous week, up 17 percent from last year, and up 24 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: 5/22/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	25.1	25.9	24.6	15.9	18.1	14.3	20.7
	Average over last 4 weeks	26.9	25.1	29.4	17.5	11.6	11.8	20.4
	Average of same 4 weeks last year	31.2	33.9	19.7	16.2	7.1	n/a	21.6
Average grain unit train speeds (miles per hour)	This week	22.9	16.7	23.0	23.5	23.6	20.2	21.6
	Average over last 4 weeks	23.4	16.4	23.2	23.5	23.3	20.2	21.6
	Average of same 4 weeks last year	21.3	19.3	25.2	22.8	24.3	n/a	22.6

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

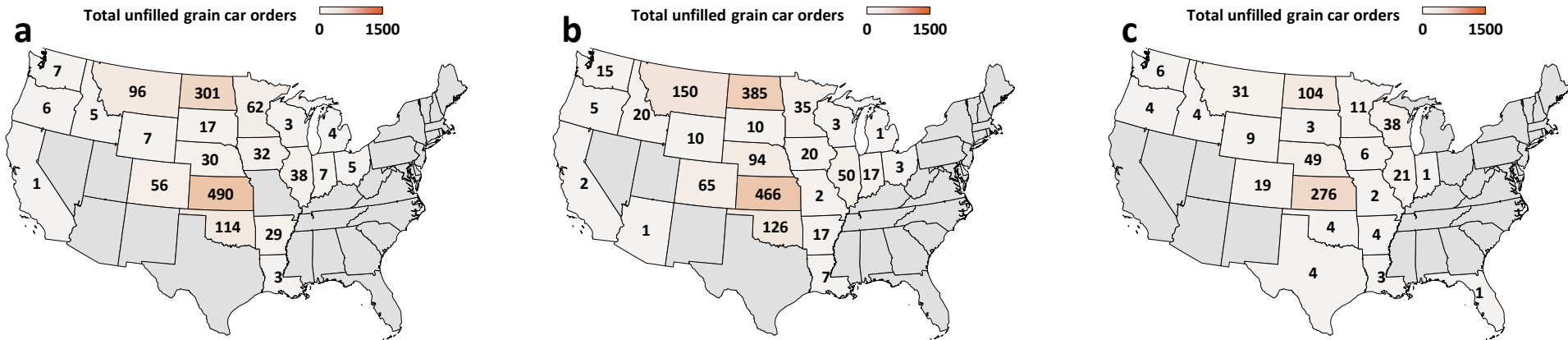
For the week ending: 5/22/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	57	15	402	81	8	117	680
	Average over last 4 weeks	59	15	342	53	6	148	623
	Average of same 4 weeks last year	37	8	233	90	7	n/a	374
Average number of loaded grain cars not moved in over 48 hours	This week	93	137	502	47	5	133	916
	Average over last 4 weeks	80	158	613	48	8	164	1,070
	Average of same 4 weeks last year	36	189	315	69	3	n/a	611
Average number of grain unit trains held	This week	0	0	5	3	0	3	12
	Average over last 4 weeks	0	0	6	4	0	4	15
	Average of same 4 weeks last year	0	0	4	5	0	n/a	10
Total unfilled manifest grain car orders	This week	36	4	524	568	0	206	1,338
	Average over last 4 weeks	45	1	621	642	0	208	1,517
	Average of same 4 weeks last year	3	6	120	368	0	n/a	497

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](#).

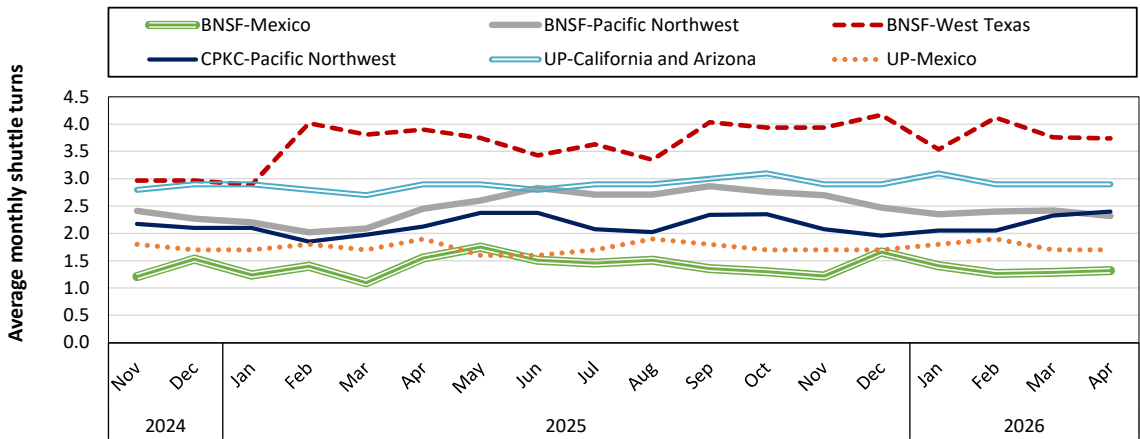
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 5/22/2026 (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

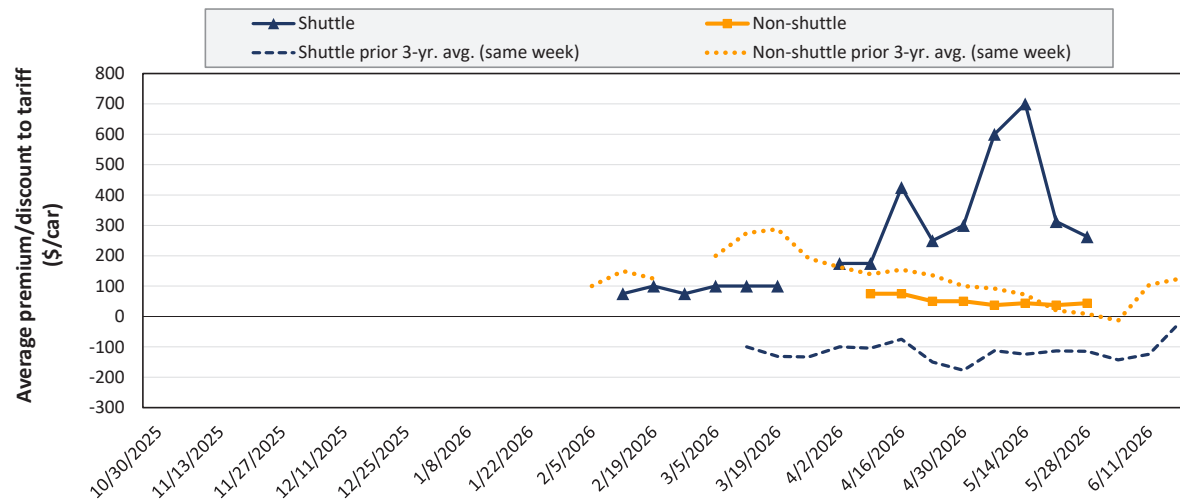


In April 2026, BNSF Railway’s average monthly grain shuttle turns were 1.3 to Mexico, 2.3 to the Pacific Northwest, and 3.7 to West Texas. CPKC’s shuttle turns averaged 2.4 to the Pacific Northwest. Union Pacific Railroad’s shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.7 to 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 June 2026



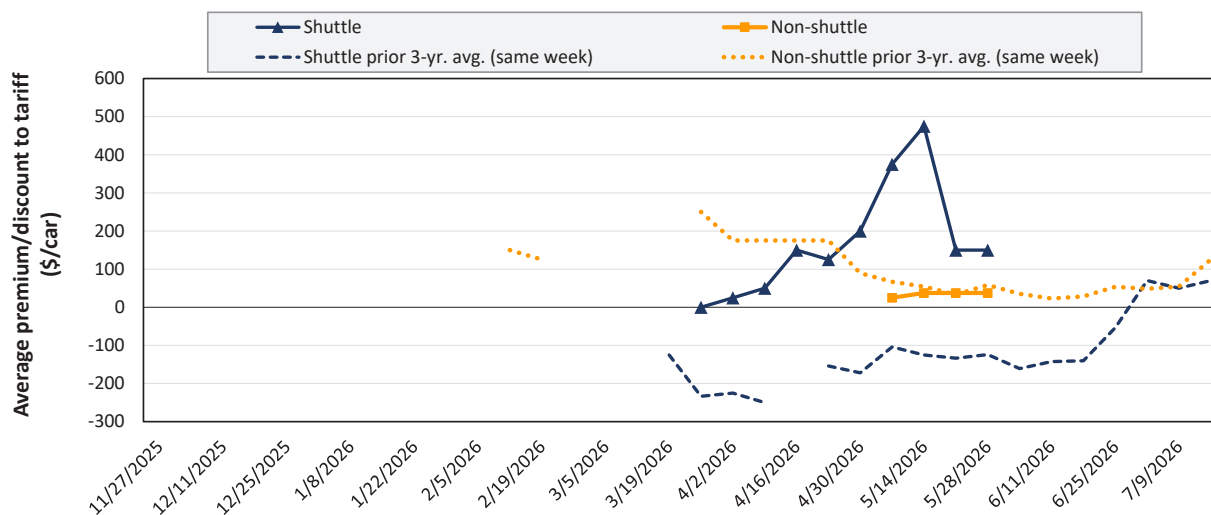
Average non-shuttle bids/offers rose \$6 this week, and are \$31 below the peak.

Average shuttle bids/offers fell \$50 this week and are \$438 below the peak.

5/28/2026	BNSF	UP
Non-Shuttle	\$50	\$38
Shuttle	\$450	\$75

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 July 2026



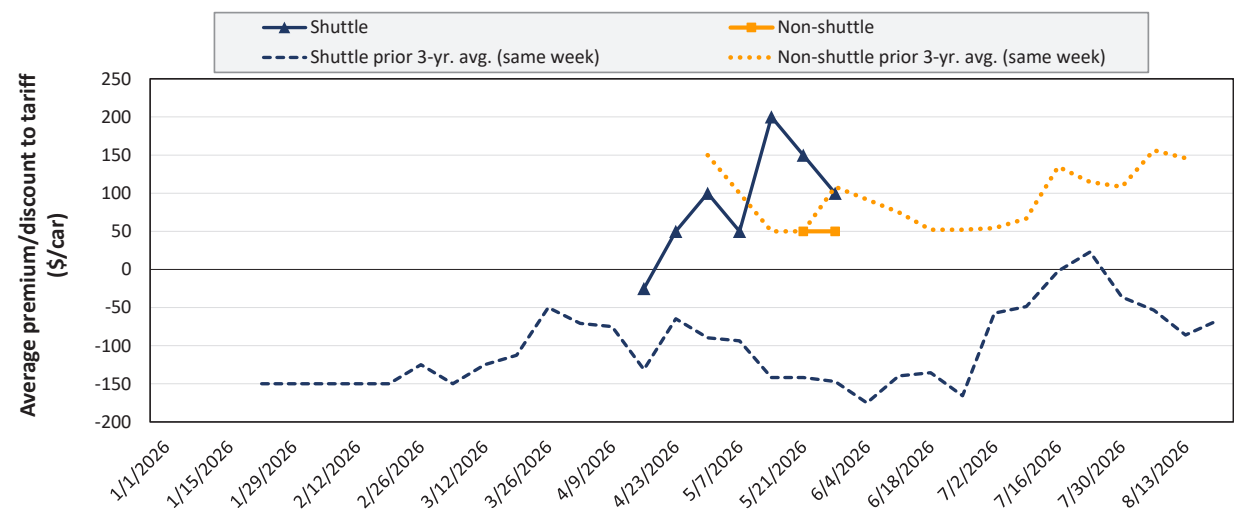
Average non-shuttle bids/offers are unchanged this week, and are at the peak.

Average shuttle bids/offers are unchanged this week and are \$325 below the peak.

5/28/2026	BNSF	UP
Non-Shuttle	\$50	\$25
Shuttle	\$300	\$0

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 August 2026



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

Average shuttle bids/offers fell \$50 this week and are \$100 below the peak.

5/28/2026	BNSF	UP
Non-Shuttle	\$50	n/a
Shuttle	\$100	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: 5/28/2026		Delivery period					
		Jun-26	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26
Non-shuttle	BNSF	50	50	50	n/a	n/a	n/a
	Change from last week	0	0	0	n/a	n/a	n/a
	Change from same week 2025	-38	-100	-100	n/a	n/a	n/a
	UP	38	25	n/a	n/a	n/a	n/a
	Change from last week	13	0	n/a	n/a	n/a	n/a
	Change from same week 2025	163	125	n/a	n/a	n/a	n/a
Shuttle	BNSF	450	300	100	n/a	1,250	n/a
	Change from last week	-100	0	-50	n/a	0	n/a
	Change from same week 2025	419	344	191	n/a	400	n/a
	UP	75	0	n/a	n/a	n/a	n/a
	Change from last week	0	0	n/a	n/a	n/a	n/a
	Change from same week 2025	275	150	n/a	n/a	n/a	n/a
	CPKC	100	100	100	n/a	n/a	n/a
	Change from last week	-100	100	250	n/a	n/a	n/a
	Change from same week 2025	200	200	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, June 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	\$568	\$6,400	\$1.73	\$63.55	11.7
	BNSF	Williston, ND	Superior, WI	Shuttle	\$4,291	\$284	\$4,575	\$1.24	\$45.43	10.5
	CPKC	Westby, MT	St. Louis, MO	Unit	\$5,788	\$1,096	\$6,884	\$1.86	\$68.36	14.6
	UP	Yuma, AZ	Houston, TX	Manifest	\$6,025	\$947	\$6,972	\$1.88	\$69.24	8.3
Hard red spring (HRS)	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	\$4,804	\$329	\$5,133	\$1.39	\$50.97	10.1
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	\$6,215	\$791	\$7,006	\$1.89	\$69.57	14.2
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	\$2,865	\$153	\$3,018	\$0.82	\$29.97	12.2
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	\$5,732	\$823	\$6,555	\$1.77	\$65.09	18.0
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	\$5,838	\$696	\$6,534	\$1.77	\$64.89	13.9
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	\$5,412	\$578	\$5,990	\$1.62	\$59.48	13.1
	CPKC	Minot, ND	Kalama, WA	Unit	\$5,298	\$970	\$6,268	\$1.69	\$62.25	6.8
	CPKC	Nekoma, ND	Chicago, IL	Manifest	\$5,030	\$583	\$5,613	\$1.52	\$55.74	11.1
Hard red winter (HRW)	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	\$3,400	\$299	\$3,699	\$1.00	\$36.73	7.2
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	\$3,400	\$367	\$3,767	\$1.02	\$37.40	3.3
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	\$5,800	\$988	\$6,788	\$1.83	\$67.41	14.0
	BNSF	Garden City, KS	San Bernardino, CA	DET	\$5,600	\$695	\$6,295	\$1.70	\$62.51	8.3
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,200	\$506	\$4,706	\$1.27	\$46.73	10.2
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,000	\$523	\$4,523	\$1.22	\$44.91	11.4
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	\$3,500	\$431	\$3,931	\$1.06	\$39.03	10.1
	BNSF	Wichita, KS	Chicago, IL	DET	\$3,700	\$293	\$3,993	\$1.08	\$39.66	6.5
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	\$3,900	\$468	\$4,368	\$1.18	\$43.38	10.6
	UP	Byers, CO	Houston, TX	Shuttle	\$4,525	\$802	\$5,327	\$1.44	\$52.90	9.3
	UP	Goodland, KS	Kansas City, MO	Manifest	\$5,067	\$300	\$5,367	\$1.45	\$53.30	5.3
	UP	Medford, OK	Houston, TX	Shuttle	\$3,775	\$396	\$4,171	\$1.13	\$41.42	5.7
	UP	Salina, KS	Houston, TX	Shuttle	\$4,025	\$528	\$4,553	\$1.23	\$45.21	7.0
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	\$4,791	\$355	\$5,146	\$1.39	\$51.10	10.6
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	\$4,439	\$449	\$4,888	\$1.32	\$48.54	13.7
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	\$2,032	\$221	\$2,253	\$0.61	\$22.37	9.4
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	\$8,611	\$357	\$8,968	\$2.42	\$89.06	7.4
	CSX	Chicago, IL	Albany, NY	Unit	\$7,676	\$357	\$8,033	\$2.17	\$79.77	8.4
	CSX	Chicago, IL	Buffalo, NY	Manifest	\$6,102	\$228	\$6,330	\$1.71	\$62.86	6.9
	CSX	Chicago, IL	Indiantown, FL	Manifest	\$8,832	\$609	\$9,441	\$2.55	\$93.75	10.2

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, June 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	\$512	\$6,112	\$1.54	\$60.69	3.9
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	\$5,470	\$880	\$6,350	\$1.60	\$63.06	13.3
	BNSF	Edison, NE	Hanford, CA	Railroad	\$5,460	\$848	\$6,308	\$1.59	\$62.64	2.7
	BNSF	Edison, NE	Hereford, TX	Railroad	\$4,500	\$362	\$4,862	\$1.23	\$48.28	-4.6
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	\$5,350	\$972	\$6,322	\$1.59	\$62.78	15.1
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	\$4,620	\$433	\$5,053	\$1.27	\$50.18	9.0
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	\$4,260	\$353	\$4,613	\$1.16	\$45.81	-5.1
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	\$4,000	\$544	\$4,544	\$1.15	\$45.12	-1.5
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	\$5,430	\$766	\$6,196	\$1.56	\$61.53	11.8
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	\$5,430	\$868	\$6,298	\$1.59	\$62.54	13.2
	CN	Gibson City, IL	Reserve, LA	Private	\$2,136	\$729	\$2,865	\$0.72	\$28.45	20.9
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,516	\$729	\$3,245	\$0.82	\$32.23	18.0
	CPKC	Delhi, LA	Morton, MS	Railroad	\$1,342	\$101	\$1,443	\$0.36	\$14.33	4.2
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,047	\$1,116	\$6,163	\$1.55	\$61.20	12.6
	CPKC	Glenwood, MN	Boardman, OR	Railroad	\$5,513	\$1,074	\$6,587	\$1.66	\$65.41	11.2
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	\$6,241	\$312	\$6,553	\$1.65	\$65.07	9.9
	CSX	Marysville, OH	Rose Hill, NC	Railroad	\$6,378	\$344	\$6,722	\$1.70	\$66.75	9.5
	CSX	Olney, IL	Fairmount, GA	Railroad	\$4,891	\$220	\$5,111	\$1.29	\$50.75	8.6
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	\$3,935	\$477	\$4,412	\$1.11	\$43.81	2.8
	UP	Frankfort, KS	Calipatria, CA	Railroad	\$5,855	\$1,085	\$6,940	\$1.75	\$68.91	7.2
Soybeans	UP	Mead, NE	Keyes, CA	Railroad	\$6,015	\$1,199	\$7,214	\$1.82	\$71.63	7.9
	UP	Nebraska City, NE	Amarillo, TX	Railroad	\$4,855	\$493	\$5,348	\$1.35	\$53.10	2.5
	UP	Sloan, IA	Burley, ID	Railroad	\$5,535	\$811	\$6,346	\$1.60	\$63.02	5.1
	UP	Sterling, IL	Nashville, AR	Railroad	\$4,075	\$499	\$4,574	\$1.15	\$45.42	3.0
	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	\$6,135	\$803	\$6,938	\$1.88	\$68.90	10.9
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	\$5,185	\$764	\$5,949	\$1.61	\$59.08	-12.7
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	\$6,085	\$778	\$6,863	\$1.85	\$68.15	10.6
	BNSF	Casselton, ND	St. Louis, MO	Railroad	\$3,400	\$408	\$3,808	\$1.03	\$37.82	9.8
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	\$6,185	\$968	\$7,153	\$1.93	\$71.03	13.3
	CN	Gibson City, IL	Reserve, LA	Private	\$2,136	\$729	\$2,865	\$0.77	\$28.45	20.9
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,516	\$729	\$3,245	\$0.88	\$32.23	18.0
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,785	\$1,116	\$6,901	\$1.87	\$68.53	11.1
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	\$3,526	\$843	\$4,369	\$1.18	\$43.39	13.4
	CSX	Casey, IL	Mobile, AL	Private	\$3,646	\$343	\$3,989	\$1.08	\$39.61	9.4
	CSX	Marion, OH	Chesapeake, VA	Private	\$3,214	\$334	\$3,548	\$0.96	\$35.24	10.4
	UP	Canton, KS	Houston, TX	Railroad	\$3,650	\$515	\$4,165	\$1.13	\$41.36	-22.5
	UP	Cozad, NE	Kalama, WA	Railroad	\$5,140	\$1,078	\$6,218	\$1.68	\$61.75	-5.9
	UP	Cozad, NE	Houston, TX	Railroad	\$4,010	\$744	\$4,754	\$1.28	\$47.21	-18.5
	UP	Sloan, IA	Ama, LA	Railroad	\$4,090	\$849	\$4,939	\$1.33	\$49.05	-17.1

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](#).

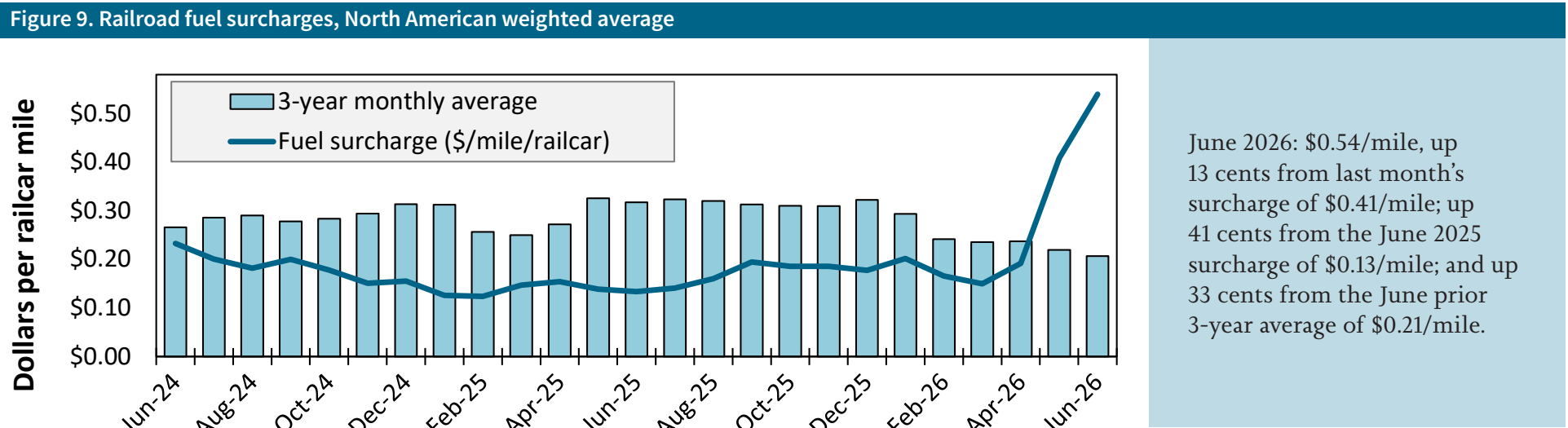
Source: BNSF Railway, Canadian National Railway, CPKC, CSX Transportation, and Union Pacific Railroad.

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

Commodity	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 V/Y change
Corn	BNSF	Adair, IL	El Paso, TX	Shuttle	\$4,641	\$590	\$5,231	\$1.31	\$51.48	12.2
	BNSF	Superior, NE	El Paso, TX	Shuttle	\$4,622	\$464	\$5,086	\$1.27	\$50.06	0.1
	CPKC	Atchison, KS	Laredo, TX	Non-shuttle	\$5,080	\$1,092	\$6,172	\$1.54	\$60.75	11.3
	CPKC	Council Bluffs, IA	Laredo, TX	Non-shuttle	\$5,550	\$1,209	\$6,759	\$1.69	\$66.52	11.5
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$1,043	\$6,048	\$1.51	\$59.52	11.0
	CPKC	Marshall, MO	Laredo, TX	Non-shuttle	\$5,190	\$1,107	\$6,297	\$1.57	\$61.98	11.3
	UP	Pontiac, IL	Eagle Pass, TX	Shuttle	\$4,535	\$881	\$5,416	\$1.35	\$53.30	6.9
	UP	Sterling, IL	Eagle Pass, TX	Shuttle	\$4,655	\$915	\$5,570	\$1.39	\$54.82	7.1
Soybeans	BNSF	Brunswick, MO	El Paso, TX	Shuttle	\$4,325	\$501	\$4,826	\$1.29	\$47.50	-10.8
	BNSF	Hardin, MO	Eagle Pass, TX	Shuttle	\$4,325	\$499	\$4,824	\$1.29	\$47.48	-10.9
	CPKC	Atchison, KS	Laredo, TX	Non-shuttle	\$5,080	\$1,092	\$6,172	\$1.65	\$60.75	11.3
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$1,043	\$6,048	\$1.62	\$59.52	11.0
	UP	Grand Island, NE	Eagle Pass, TX	Shuttle	\$4,950	\$838	\$5,788	\$1.55	\$56.97	-12.5
	UP	Roelyn, IA	Eagle Pass, TX	Shuttle	\$5,035	\$878	\$5,913	\$1.58	\$58.20	-12.0
Wheat	BNSF	FT Worth, TX	El Paso, TX	DET	\$3,100	\$361	\$3,461	\$0.93	\$34.06	13.0
	BNSF	FT Worth, TX	El Paso, TX	Shuttle	\$2,600	\$361	\$2,961	\$0.79	\$29.14	3.4
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$1,043	\$6,048	\$1.62	\$59.52	11.0
	UP	Great Bend, KS	Laredo, TX	Shuttle	\$4,325	\$629	\$4,954	\$1.33	\$48.76	7.7
	UP	Wichita, KS	Laredo, TX	Shuttle	\$4,065	\$554	\$4,619	\$1.24	\$45.46	7.3

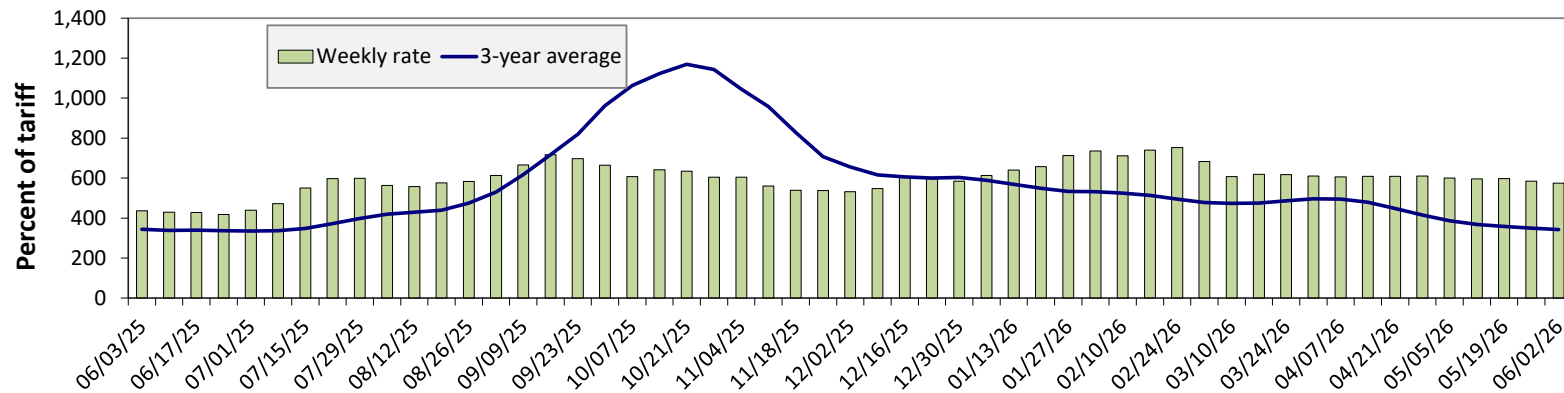
Note: After December 2021, U.S. railroads stopped reporting "through rates" from the U.S. origin to the Mexican destination. Thus, the table shows "Rule 11 rates," which cover only the portion of the shipment from a U.S. origin to locations on the U.S.-Mexico border. The Rule 11 rates apply only to shipments 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 Canadian Pacific Kansas City Railway (CPKC) shipments and is made up of 75 cars or more (except the Marshall, MO, rate is for a 50-74 car train). BNSF Railway's domestic efficiency trains (DET) are shuttle-length trains (typically 110 cars) that can be split en route for unloading at multiple destinations. Percentage change month to month (M/M) and year to year (Y/Y) are calculated using the tariff rate plus fuel surcharge. For a larger list of to-the-border rates, see [AgTransport](#).

Source: BNSF Railway, Union Pacific Railroad, and CPKC (formerly, Kansas City Southern Railway).



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

Figure 10. Illinois River barge freight rate



For the week ending June 2: 2 percent lower than the previous week; 31 percent higher than last year; and 68 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	6/2/2026	678	594	574	409	388	372
	5/26/2026	671	599	584	450	403	370
\$/ton	6/2/2026	41.97	31.60	26.63	16.32	18.20	11.68
	5/26/2026	41.53	31.87	27.10	17.96	18.90	11.62
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	38	29	31	30	19	29
	3-year avg.	63	61	68	61	43	57
Rate	July	678	584	562	420	392	374
	September	782	753	746	740	739	756

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](#).

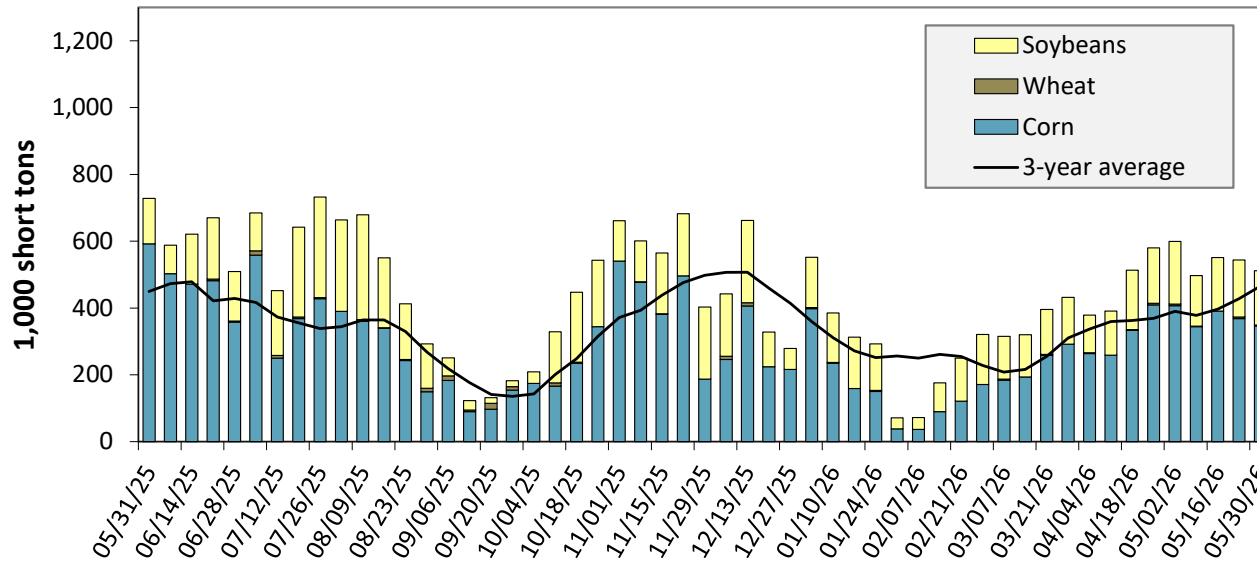
Source: USDA, Agricultural Marketing Service.

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 May 30: 30 percent lower than last year and 10 percent higher than the 3-year average.

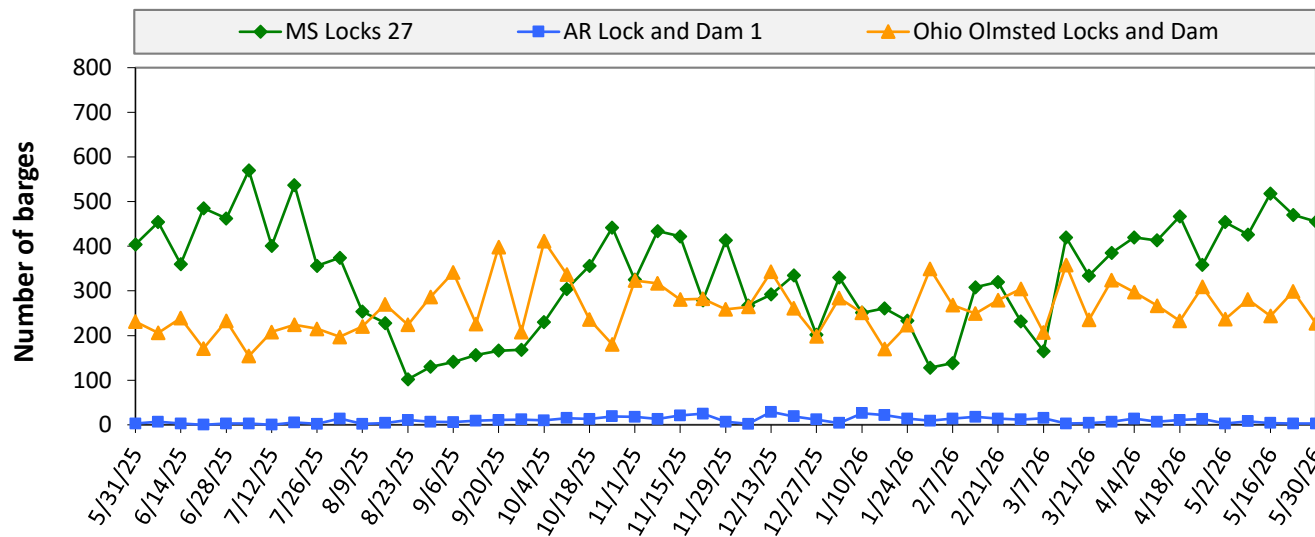
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 05/30/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	175	3	88	0	267
Mississippi River (Winfield, MO (L25))	226	0	98	0	324
Mississippi River (Alton, IL (L26))	292	2	142	0	436
Mississippi River (Granite City, IL (L27))	347	2	163	0	512
Illinois River (La Grange)	74	0	33	0	107
Ohio River (Olmsted)	35	4	22	0	60
Arkansas River (L1)	0	21	15	0	36
Weekly total - 2026	382	26	200	0	608
Weekly total - 2025	680	2	174	3	859
2026 YTD	6,888	369	4,436	45	11,737
2025 YTD	8,449	427	4,551	97	13,524
2026 as % of 2025 YTD	82	86	97	46	87
Last 4 weeks as % of 2025	71	87	126	111	83
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.

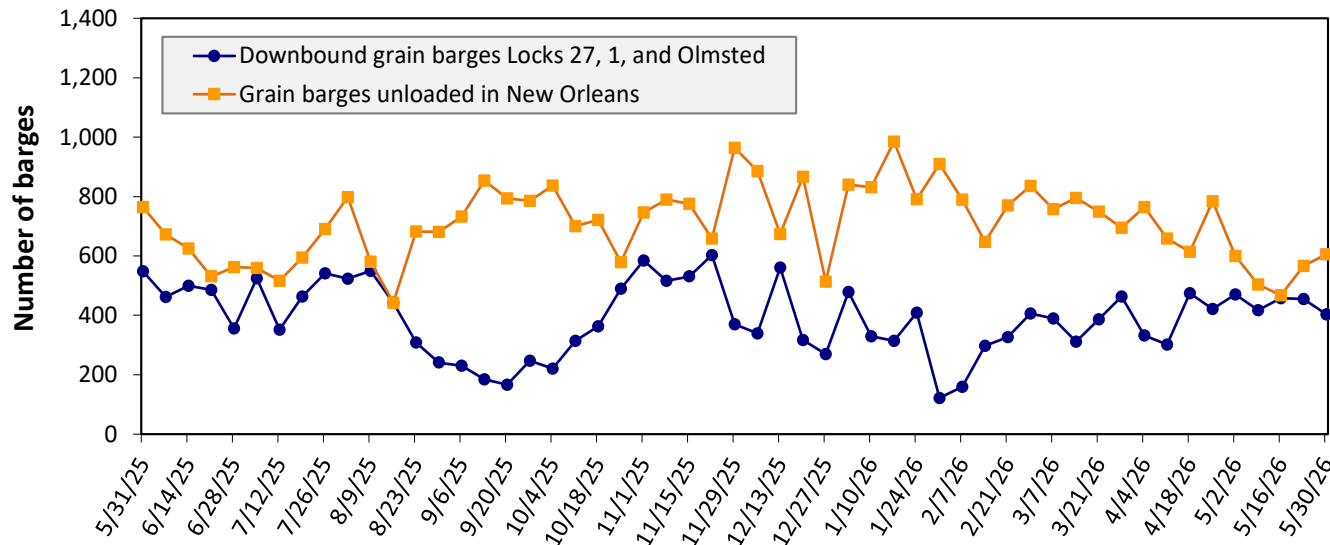
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending May 30: 685 barges transited the locks, 87 barges fewer than the previous week, and 19 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 May 30: 404 barges moved down river, 51 fewer than the previous week; 605 grain barges unloaded in the New Orleans Region, 7 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	
		June 2026	May 2026	June 2025	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$25.42	\$24.43	\$21.63	17.5	21.1
	Central Ferry, WA/Almota, WA	\$24.49	\$23.50	\$20.73	18.1	21.7
	Lyons Ferry, WA	\$23.44	\$22.45	\$19.72	18.9	22.3
	Windust, WA/Lower Monumental, WA	\$22.37	\$21.38	\$18.69	19.7	23.1
	Sheffler, WA	\$22.34	\$21.35	\$18.66	19.7	23.1
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$21.10	\$20.11	\$17.46	20.8	24.1
	Port Kelly, WA/Wallula, WA	\$20.87	\$19.88	\$17.24	21.0	24.3
	Umatilla, OR	\$20.77	\$19.78	\$17.14	21.2	24.4
	Boardman, OR/Hogue Warner, OR	\$20.50	\$19.51	\$16.88	21.4	24.6
	Arlington, OR/Roosevelt, WA	\$20.34	\$19.35	\$16.72	21.6	24.8
	Biggs, OR	\$18.96	\$17.97	\$15.39	23.2	26.2
	The Dalles, OR	\$17.82	\$16.83	\$14.29	24.7	27.5

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

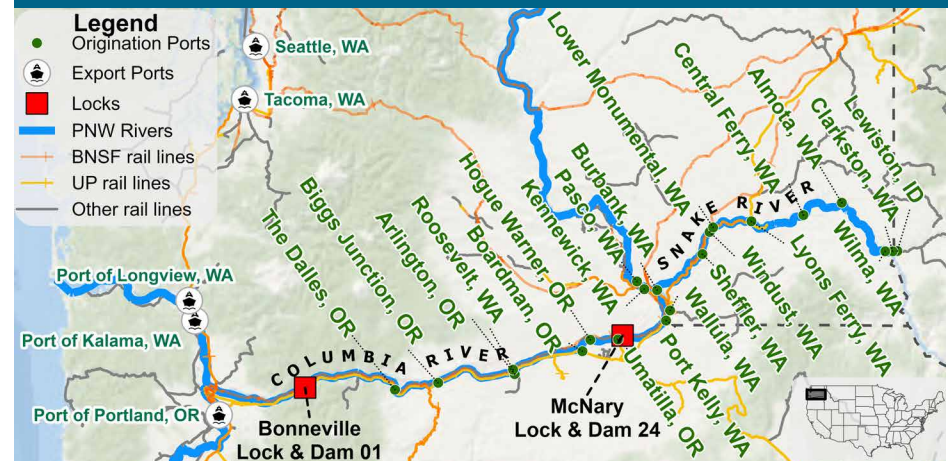
Table 12. Monthly barged grain movements, Columbia-Snake (1,000 tons)

May, 2026	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	179	0	179
Columbia River (Bonneville Lock and Dam (L1))	237	0	237
Monthly total 2026	237	0	237
Monthly total 2025	402	0	402
2026 YTD	1,397	0	1,397
2025 YTD	1,730	0	1,730

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.

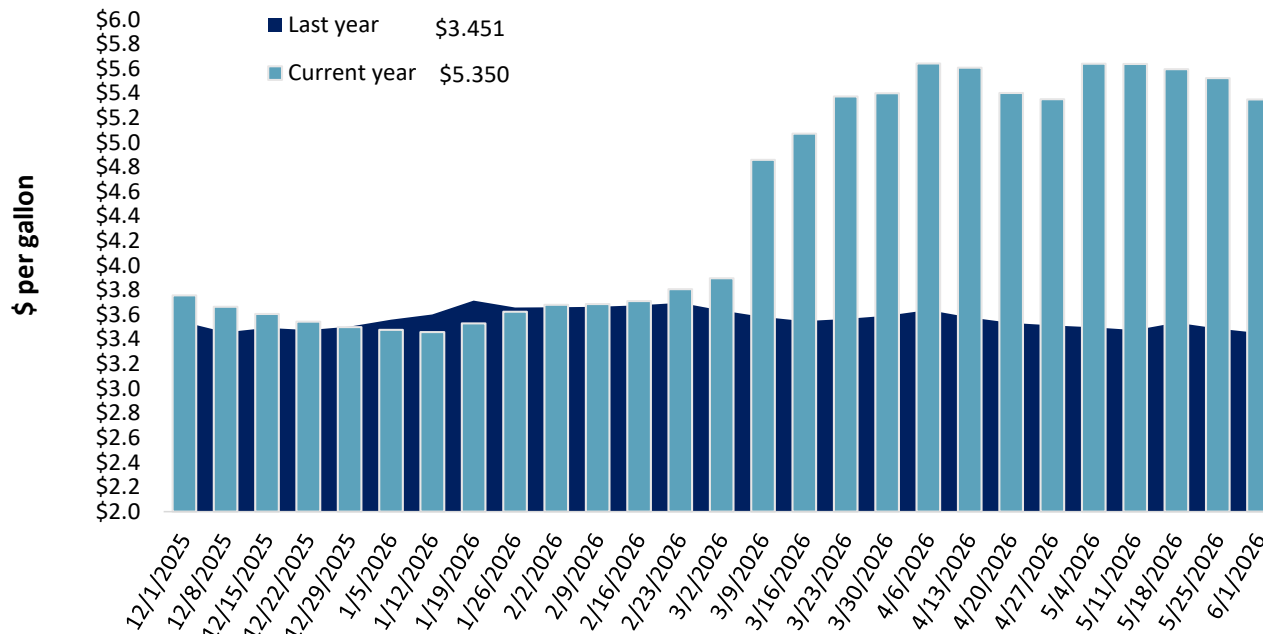
Table 13. Retail on-highway diesel prices, week ending 6/01/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	5.237	-0.157	1.720
	New England	5.731	-0.068	1.846
	Central Atlantic	5.694	-0.116	1.928
	Lower Atlantic	5.016	-0.185	1.632
II	Midwest	5.392	-0.231	2.004
III	Gulf Coast	4.900	-0.145	1.803
IV	Rocky Mountain	5.331	-0.162	1.878
V	West Coast	6.398	-0.102	2.177
	West Coast less California	5.832	-0.077	2.087
	California	7.051	-0.131	2.283
Total	United States	5.350	-0.173	1.899

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 June 1, the U.S. average diesel fuel price decreased 17.3 cents from the previous week to \$5.35 per gallon, 189.9 cents above the same week last year.

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

Source: U.S. Department of Energy, Energy Information Administration.

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

Grain Exports		Wheat						Corn	Soybeans	Total
		Hard red winter (HRW)	Soft red winter (SRW)	Hard red spring (HRS)	Soft white wheat (SWW)	Durum	All wheat			
Current unshipped (outstanding) export sales	For the week ending 05/28/2026	198	79	30	41	0	349	19,184	4,364	23,897
	This week year ago	185	51	93	31	18	377	15,288	3,985	19,650
	Last 4 wks. as % of same period 2024/25	338	18	548	1,117	146	450	130	120	134
Current shipped (cumulative) exports sales	2025/26 YTD	8,218	3,161	6,006	5,194	617	23,262	62,582	35,584	121,429
	2024/25 YTD	5,271	3,076	6,512	5,706	335	20,900	49,850	44,543	115,293
	YTD 2025/26 as % of 2024/25	156	103	92	91	184	111	126	80	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 5/28/2026	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2022-24 (1,000 mt)
	YTD MY 2026/27	YTD MY 2025/26	YTD MY 2024/25		
Mexico	2,019	23,190	21,466	8	19,839
Japan	588	14,476	11,396	27	10,478
Colombia	43	7,467	6,721	11	5,493
China	0	0	33	-100	3,461
Korea	0	8,578	5,386	59	3,127
Top 5 importers	2,650	53,711	45,003	19	42,399
Total U.S. corn export sales	3,197	81,767	65,138	26	54,276
% of YTD current month's export projection	4%	98%	90%	-	-
Change from prior week	244	883	942	-	-
Top 5 importers' share of U.S. corn export sales	83%	66%	69%	-	78%
USDA forecast May 2026	80,014	83,824	72,597	15	-
Corn use for ethanol USDA forecast May 2026	142,240	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 5/28/2026	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2022-24 (1,000 mt)
	YTD MY 2026/27	YTD MY 2025/26	YTD MY 2024/25		
China	0	11,954	22,479	-47	26,078
Mexico	222	4,814	4,909	-2	4,762
Japan	75	2,025	1,866	8	2,107
Egypt	0	4,652	2,970	57	2,098
Indonesia	16	2,189	1,706	28	1,997
Top 5 importers	313	25,634	33,929	-24	37,042
Total U.S. soybean export sales	890	39,948	48,528	-18	48,941
% of YTD current month's export projection	2%	96%	95%	-	-
Change from prior week	243	277	194	-	-
Top 5 importers' share of U.S. soybean export sales	35%	64%	70%	-	76%
USDA forecast, May 2026	44,361	41,640	51,220	-19	-

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 5/28/2026	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2022-24 (1,000 mt)
	YTD MY 2026/27	YTD MY 2025/26	YTD MY 2024/25		
Mexico	742	4,440	3,832	16	3,358
Philippines	636	2,646	2,576	3	2,473
Japan	425	2,072	2,115	-2	2,045
China	0	336	139	142	1,137
Korea	527	1,889	2,423	-22	1,674
Taiwan	157	970	983	-1	935
Thailand	118	712	897	-21	667
Nigeria	39	1,566	801	95	629
Indonesia	0	1,091	781	40	518
Colombia	80	746	568	31	489
Top 10 importers	2724	16,469	15,115	9	13,926
Total U.S. wheat export sales	3,926	23,611	21,277	11	19,135
% of YTD current month's export projection	19%	95%	95%	-	-
Change from prior week	839	-642	-49	-	-
Top 10 importers' share of U.S. wheat export sales	69%	70%	71%	-	73%
USDA forecast, May 2026	21,092	24,766	22,480	10	-

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)

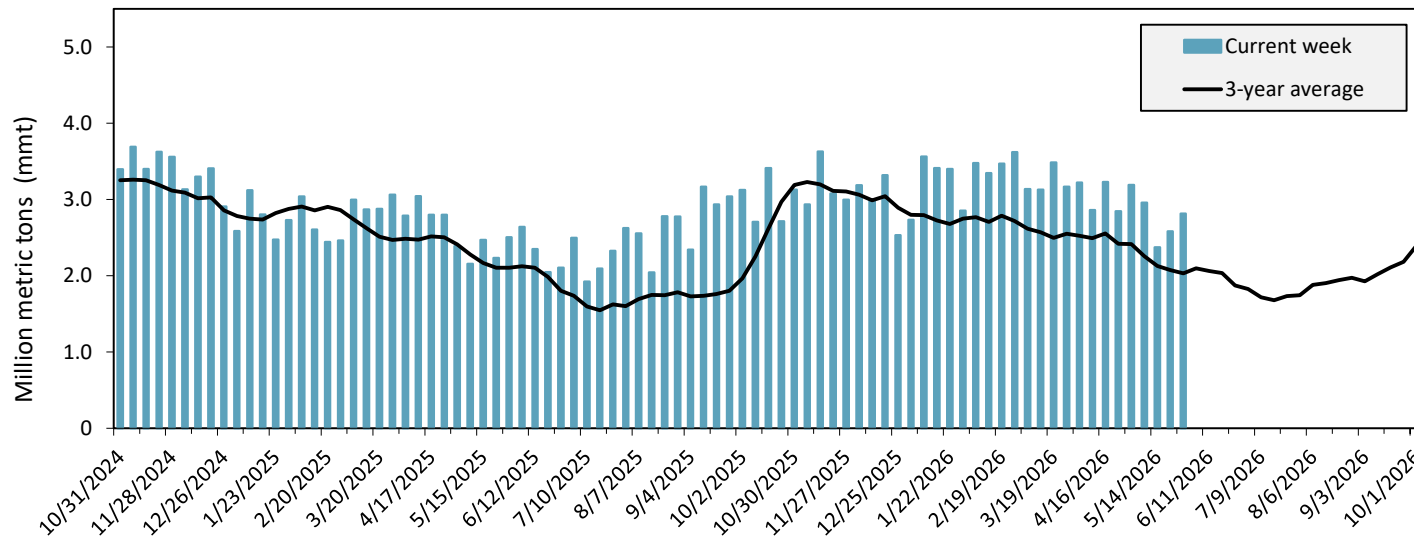
Port regions	Commodity	For the week ending 05/28/2026	Previous week*	Current week as % of previous	2026 YTD*	2025 YTD*	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	625	649	96	11,044	10,882	101	108	130	24,214
	Soybeans	77	119	65	3,959	1,966	201	n/a	n/a	2,957
	Wheat	246	152	162	4,270	4,732	90	75	96	12,271
	All grain	948	920	103	19,429	17,674	110	119	140	39,721
Mississippi Gulf	Corn	683	553	124	15,797	15,720	100	91	102	37,115
	Soybeans	282	250	113	11,173	9,579	117	169	168	23,350
	Wheat	37	48	78	1,283	1,451	88	69	63	3,980
	All grain	1,002	851	118	28,252	26,750	106	102	110	64,484
Texas Gulf	Corn	13	57	23	625	116	540	656	330	590
	Soybeans	0	0	n/a	100	106	94	n/a	n/a	1,431
	Wheat	34	99	34	1,614	1,485	109	69	115	4,690
	All grain	227	156	145	5,298	1,832	289	151	156	7,774
Interior	Corn	377	293	129	6,663	5,465	122	118	136	15,546
	Soybeans	133	164	81	3,044	2,796	109	126	152	7,712
	Wheat	85	80	105	1,312	1,239	106	131	151	3,104
	All grain	605	545	111	11,256	9,749	115	120	143	26,887
Great Lakes	Corn	0	21	0	218	0	n/a	n/a	n/a	414
	Soybeans	0	0	n/a	20	0	n/a	n/a	239	63
	Wheat	0	0	n/a	112	93	121	214	141	434
	All grain	0	21	0	350	93	376	728	341	911
Atlantic	Corn	30	30	98	733	154	477	498	802	607
	Soybeans	3	57	5	543	444	122	n/a	637	1,085
	Wheat	0	0	n/a	6	34	18	0	0	81
	All grain	33	87	37	1,282	632	203	567	640	1,773
All Regions	Corn	1,728	1,604	108	35,079	32,336	108	106	121	78,486
	Soybeans	494	589	84	19,244	14,994	128	216	229	36,851
	Wheat	402	380	106	8,598	9,034	95	81	101	24,560
	All grain	2,815	2,580	109	66,273	56,833	117	117	132	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.

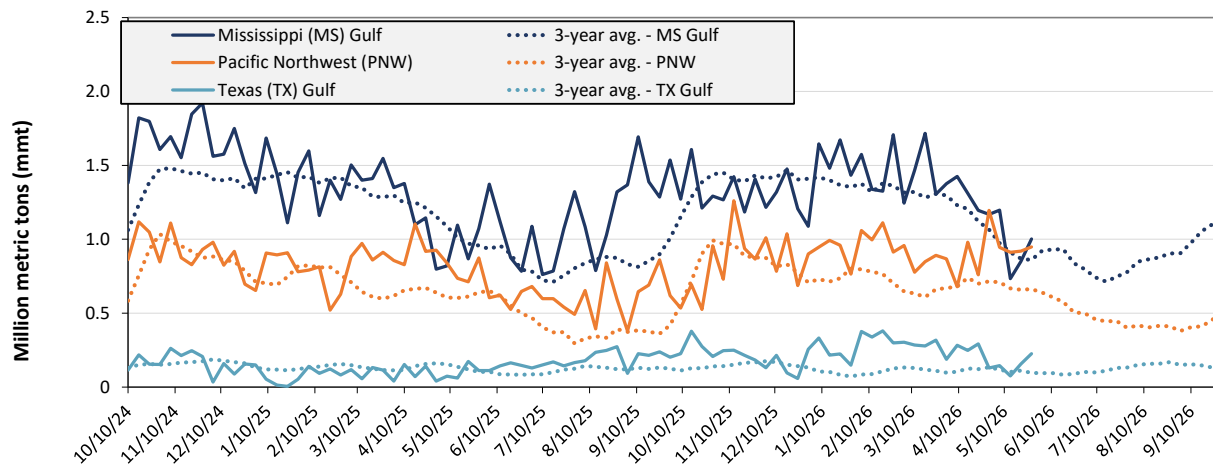
The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 46 percent of U.S.-grown wheat, 47 percent of U.S.-grown soybeans, and 15 percent of the U.S.-grown corn. In 2025, approximately 51 percent of the U.S. grain-export shipments departed through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

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



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 05/28/26 inspections (mmt):

MS Gulf: 1

PNW: 0.95

TX Gulf: 0.23

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 18	up 45	up 22	up 3
Last year (same 7 days)	up 4	up 148	up 16	up 6
3-year average (4-week moving average)	up 16	up 135	up 28	up 43

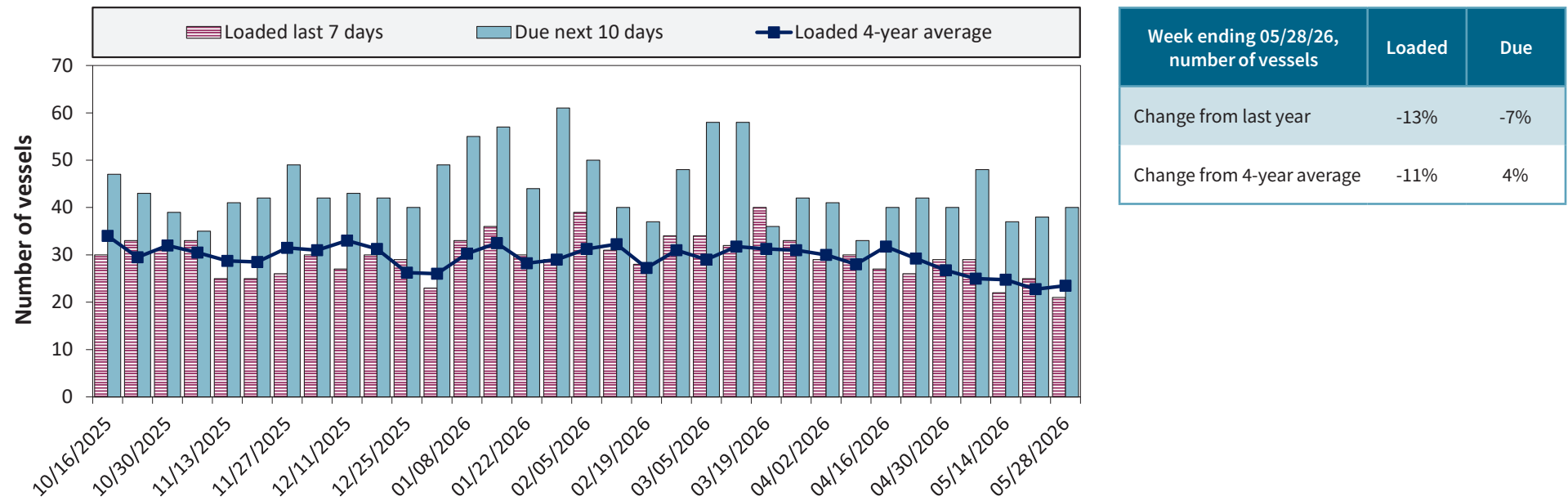
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
5/28/2026	32	21	40	14
5/21/2026	30	25	38	17
2025 range	(12...40)	(11...37)	(26...55)	(5...25)
2025 average	28	28	45	13

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

Source: USDA, Agricultural Marketing Service.

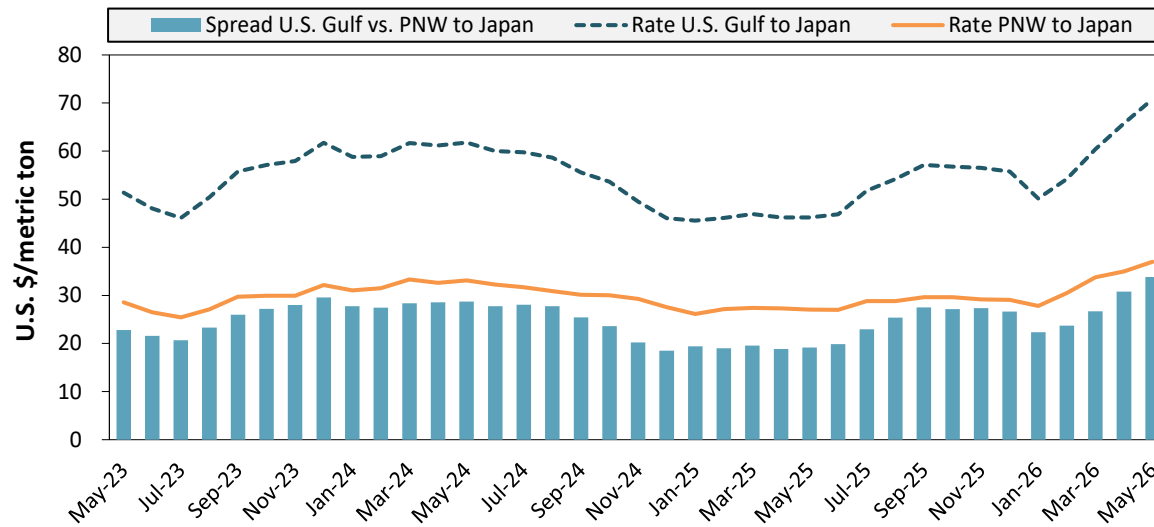
Figure 19. U.S. Gulf vessel loading activity



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
May 2026	\$70.81	\$37.00	\$33.81
Change from May 2025	53%	37%	77%
Change from 4-year average	18%	10%	28%

Table 20. Ocean freight rates for selected shipments, week ending 05/30/2026

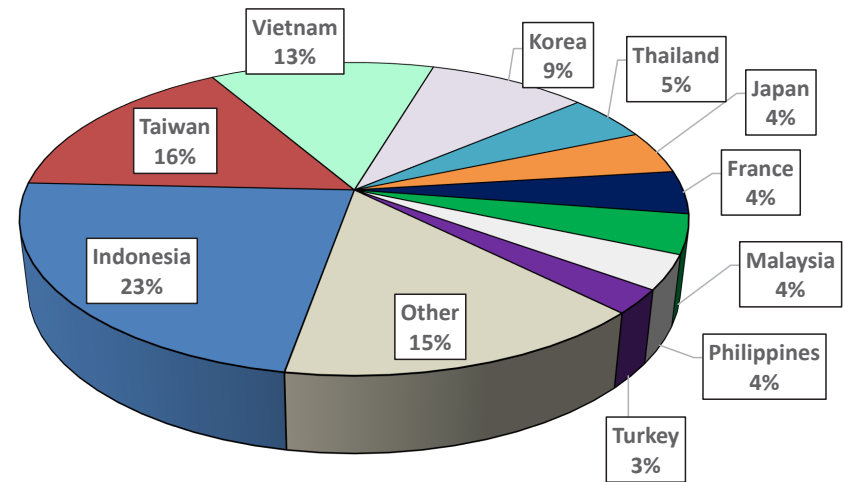
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Colombia	Soybean meal	Mar 24, 2026	May 1/10, 2026	50,000	31.60
PNW	Japan	Heavy grain	May 21, 2026	Jun 20/Jul 21, 2026	65,000	47.25
PNW	Bangladesh	Soybeans	Mar 11, 2026	May 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	Apr 28, 2026	Jun 1/30, 2026	63,000	49.75
Brazil	N. China	Soybeans	May 29, 2026	Jun 24/29, 2026	63,000	52.25
Brazil	N.China	Heavy grain	May 28, 2026	Jun 21/30, 2026	66,000	55.50
Brazil	N. China	Heavy grain	Apr 30, 2026	May 25/31, 2026	64,000	54.50
Brazil	N. China	Heavy grain	Apr 17, 2026	May 5/14, 2026	66,000	52.00
Brazil	China	Heavy grain	May 26, 2026	Jun 13/20, 2026	66,000	54.25
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

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.

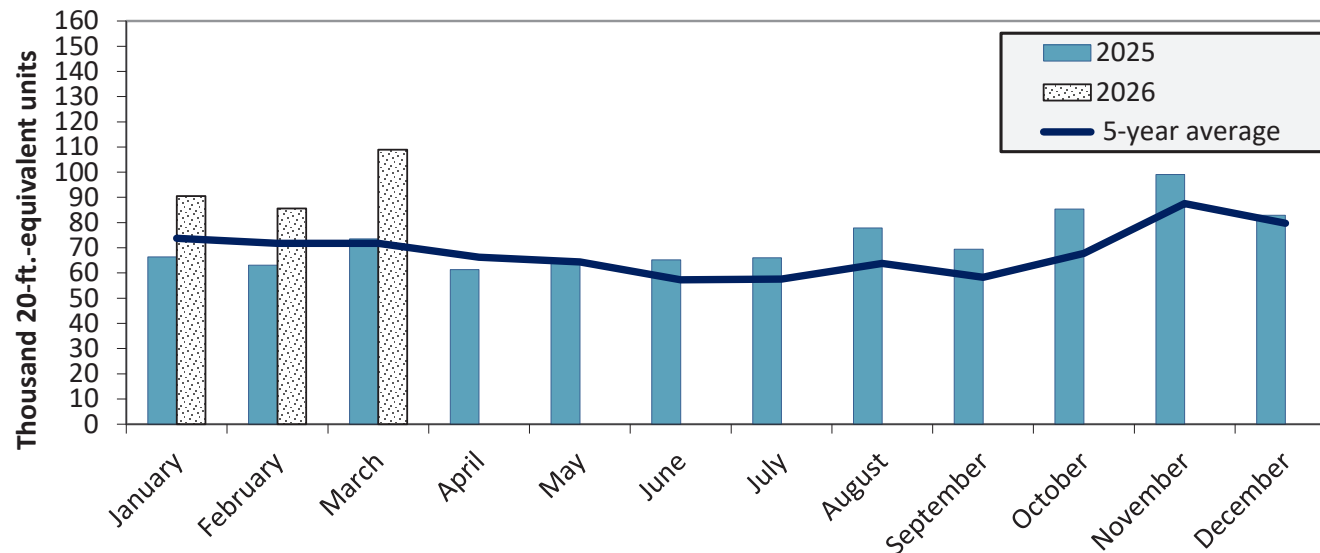
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Mar 2026



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 March 2026 were up 48.0 percent from last year and up 51.6 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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