



Grain Transportation Report

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Panama Canal Cuts Transits and Draft Levels Amid High Demand. From June 9 to 17, the Panama Canal will cut its daily transit slots on its panamax locks from 26 to 16, for regular lock [maintenance](#). Also, in anticipation of an [El Niño](#) weather pattern, the Canal's [maximum authorized draft](#) for vessels transiting the neopanamax locks will drop from 50 feet to 49.5 feet starting on July 3. The last El Niño weather pattern in 2023-24 led the Canal to restrict both drafts and transits—actions that caused the rerouting of Asia-bound U.S. grain exports ([Grain Transportation Report \(GTR\), November 23, 2023](#)).

The Panama Canal's current draft and transit restrictions come at a time of protracted, above-average congestion, due to the strong growth of U.S. oil and natural gas exports ([GTR, April 30, 2026, third highlight](#)). As of this morning (June 11), 64 vessels (15 without a reservation) [waited to transit the Canal](#). The average wait period for southbound ships arriving without a reservation was 8.6 days and the maximum was 29 days.

Annual Grain Journal Transportation Issue Released. Grain Journal recently published its annual [May/June "Transportation Issue,"](#) which examines how infrastructure investments and risk management strategies are evolving to meet logistical challenges. One article discusses a Schiff Farms' facility (completed in 2025) on the Delmarva Central Railroad in Harrington, DE: designed to move grain efficiently from truck to rail, the multi-grain transload and storage site can unload trucks at 10,000 bushels per hour.

Another article examines the legal and financial risks involved in hiring third-party motor carriers, a common occurrence for hauling grain. The author explains that, although physical hauling operations are transferred, some risk remains (e.g., insurance gaps, cargo quality). This exposure can be mitigated by replacing informal handshake deals with formal agreements, like "master transportation agreements" and "transportation services agreements."

Overall, the May/June *Grain Journal* issue underscores the importance of transportation: "movement drives everything in grain... Every move depends on timing, communication, and infrastructure working together under pressure."

Covered Hopper Lease Rates Below a Year Ago. In a June 2026 article of [Railway Age](#) (starting on page 10), an industry expert noted that the railcar lease market "continues to exhibit strength and stability." With carloadings higher than a year ago and railcar build rates below the rate of replacement, the author suggests that the North American railcar fleet may be approaching maximum capacity.

The article listed current monthly rates for several rail car types used to transport grain: large covered hoppers (C-114) range from high \$400s to low \$500s (full service contract). New C-114 hoppers are higher—in the low \$600s. Small covered hoppers (C-113) range from high \$300s to low \$400s. The C-113 cars are important for short line railroads, whose tracks cannot always handle the larger (C-114) cars.

Despite the higher grain carloadings and tightness in the overall railcar market, covered hopper lease rates are lower than they were a year ago ([GTR, June 26, 2025, third highlight](#)).

FHWA Offers \$3 Billion To Upgrade Aging Bridges. The Bridge Investment Program (BIP) of the Department of Transportation's Federal Highway Administration (FHWA) is [making \\$3 billion available](#) for States to rehabilitate or replace aging bridges. BIP's notice of funding opportunity (NOFO) offers two types of grants: "Planning" grants support planning, feasibility analyses, and revenue forecasting. "Bridge Project" grants support bridge replacement, rehabilitation, preservation, and protection projects, with total eligible costs up to \$100 million.

As noted by USDA's 2019 report [The Importance of Highways to U.S. Agriculture](#), trucks/highways carry the majority of agricultural freight across all commodity groups, including more than 70 percent of grain tonnage (in 2018). Narrow or weight-restricted bridges in rural areas often require trucks to use less direct routes, adding cost and reducing efficiency.

The BIP application criteria are [outlined in the NOFO](#). Planning grant applications are due by June 15, and Bridge Project grant applications are due by June 29.

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 June 4, [unshipped balances](#) of corn and soybeans totaled 22.43 million metric tons (mmt), down 5 percent from last week and up 25 percent from the same time last year. The unshipped balance of wheat for MY 2026/27, which began on June 1 was 4.33 mmt, down 25 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26 were 1.0 mmt, UP 13 percent from last week. Net [soybean export sales](#) were 0.21 mmt down 24 percent from last week. Net [wheat export sales](#) for marketing year 2026/27 were 0.67 mmt.

Rail

U.S. Class I railroads originated 31,705 [grain carloads](#) during the week ending May 30. This was an 11-percent increase from the previous week, 32 percent more than last year, and 37 percent more than the 3-year average.

Average June [shuttle secondary railcar bids/offers](#) (per car) were \$167 above tariff for the week ending June 4. This was \$96 less than last week and \$221 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$50 above tariff. This was \$6 more than last week and \$75 more than this week last year.

Barge

For the week ending June 6, [barged grain movements](#) totaled 667,860 tons. This was 10 percent more than the previous week and 8 percent less than the same week last year.

For the week ending June 6, 446 [barges moved down river](#), 42 more than the previous week. There were 624 grain barges unloaded in the New Orleans region, 3 percent more than the previous week.

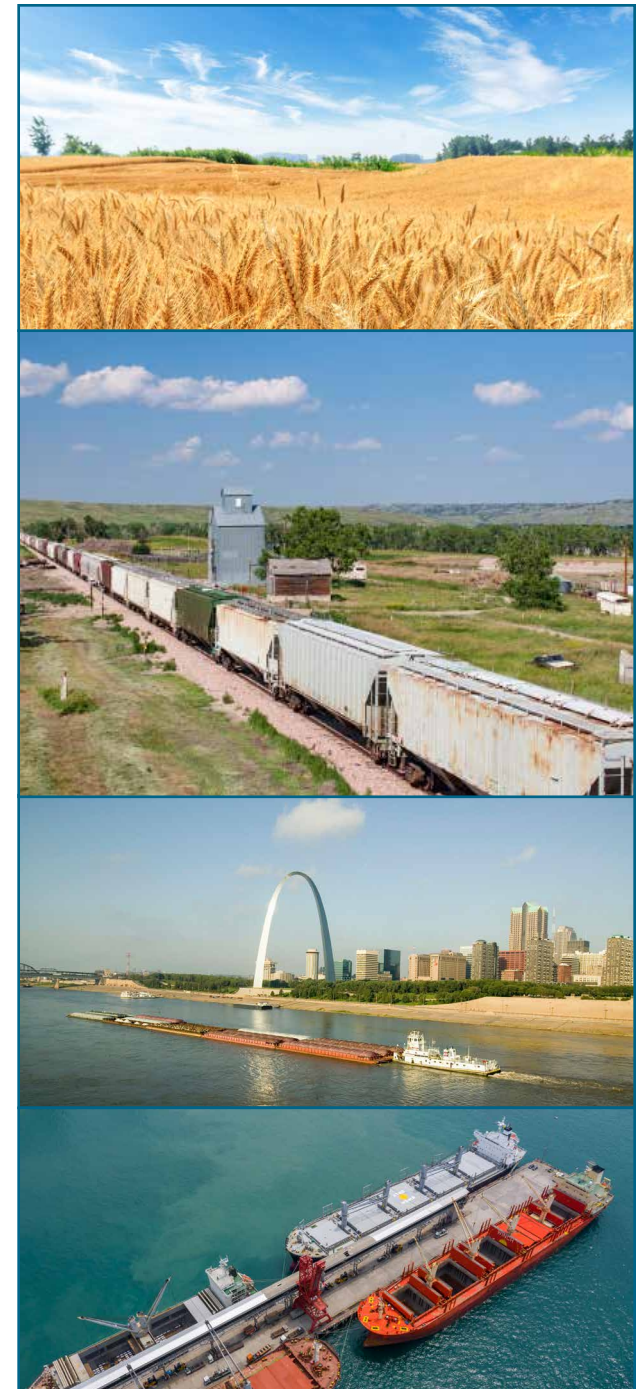
Ocean

For the week ending June 4, 36 [oceangoing grain vessels](#) were loaded in the Gulf—13 percent more than the same period last year. Within the next 10 days (starting June 5), 29 vessels were expected to be loaded—34 percent fewer than the same period last year.

As of June 4, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$71.75, down 1 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 8, the [U.S. average diesel fuel price](#) decreased 14.0 cents from the previous week to \$5.21 per gallon, 173.9 cents above the same week last year.



Export Sales Update for Marketing Year 2025/26

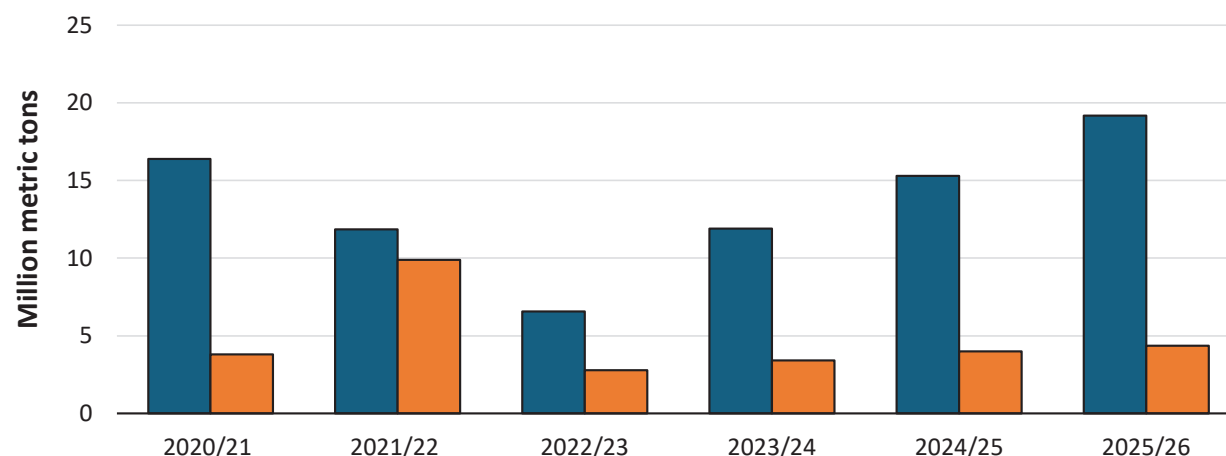
U.S. grain exports (corn, soybeans, and wheat) can have a big impact on transportation demand, because they are such large shares of total grain shipments: from 2017 to 2022, grain exports [accounted for](#) 45 percent of barged grain shipments, 39 percent of railed grain shipments, and 16 percent of trucked grain shipments.

In marketing year (MY) 2025/26, steady demand has driven strong exports of U.S. corn and wheat. Additionally, U.S. corn exports are driven by robust production and competitive pricing. In contrast, MY 2025/26 U.S. soybean exports are forecasted to account for a record-low [23 percent](#) of total global trade, their lowest level in 13 years. This decline reflects competition from Brazil and Argentina, reduced shipments to China, and higher domestic crush demand.

USDA's Foreign Agricultural Service (FAS) tracks weekly commitments to purchase U.S. grain (sales) and weekly grain exports. Total commitments include year-to-date (YTD) accumulated exports, as well as MY 2025/26 purchase commitments that have not yet shipped (outstanding sales).¹ Outstanding sales represent future transportation demand. Compared to the same period in MY 2024/25, YTD accumulated corn and soybean exports are up 4 percent, and outstanding sales are up

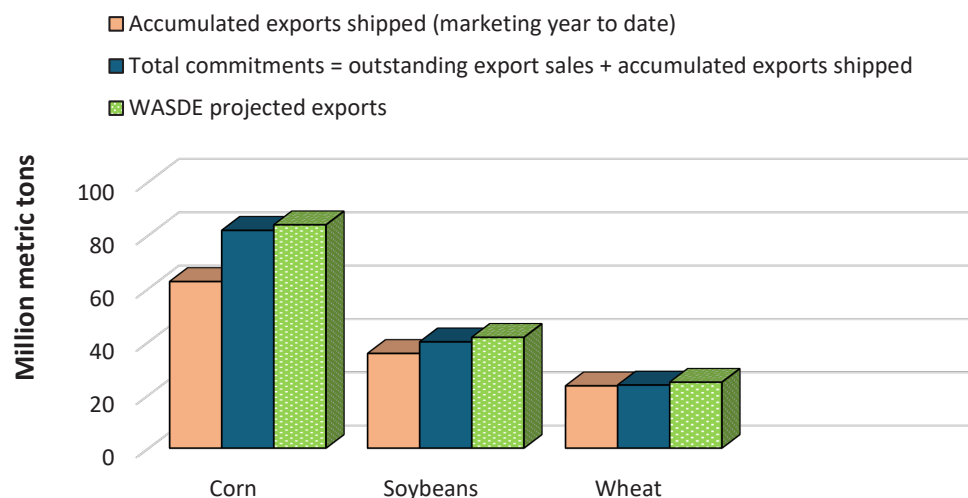
¹ Unless otherwise specified, YTD periods for MY 2025/26 are as of May 28.

Figure 1. Outstanding sales of U.S. corn and soybeans: September 1 to May 28, 2020/21-2025/26



Source: USDA, Foreign Agricultural Service.

Figure 2. Export indicators for 2025/26: total commitments and cumulative and projected exports



Note: Accumulated exports shipped (orange column) and total commitments (yellow column) are for the marketing year 2025/26 through May 28 for corn and soybean and through May 31 for wheat. The May World Agricultural Supply and Demand Estimates' (WASDE) projected exports (green column), reflect the entire marketing year.

Source: USDA, Agricultural Marketing Service.

22 percent ([Grain Transportation Report \(GTR\) table 14](#)).² The total commitments for wheat for MY 2026/27, which began on June 1 were down 22 percent from the same time last year.

This article focuses on marketing year-to-date (YTD) U.S. grain export levels and on the ways key export destinations for U.S. grain affect grain transportation demand. The piece concludes with a look ahead to MY 2026/27.

Highest Corn Export Sales Since MY 2020/21

MY 2025/26 U.S. corn exports have been driven by record production, strong demand for U.S. corn from major purchasers, and competitive pricing with all other major exporting countries.

The May [World Agricultural Supply and Demand Estimates \(WASDE\) report](#) projects U.S. corn exports for MY 2025/26 at 83.82 million metric tons. If realized, this total volume will be the largest since MY 2020/21. YTD total commitments are up 26 percent from MY 2024/25 and include 19.2 mmt in outstanding sales ([figs. 1 and 2](#)), which are up 25 percent from last year ([GTR table 15](#)).

The three-largest buyers of U.S. corn—Mexico, Japan, and Colombia—account for 29 percent, 18 percent, and 10 percent, respectively, of YTD accumulated U.S. corn exports.

Mexico's YTD total commitments (of 23.2 mmt) are up 8 percent from the same MY 2024/25 period. Although Mexican corn production has

risen to meet [higher feed demand](#) from domestic poultry, swine, and cattle sectors, Mexico's U.S. corn purchases continue strong.

Japan's YTD total commitments (of 14.5 mmt) are up 27 percent from same period last year, driven by higher feed demand for competitively priced corn. Japan imports corn mainly from the United States and Brazil based on their competitive pricing. Since February 2025, 99 percent of [Japan's corn imports](#) have been from the United States.

Compared to the same period last year, Colombia's YTD total corn commitments (of 7.5 mmt) are up 11 percent, [supported by](#) strong demand from the Colombian feed industry, lower international corn prices, and the appreciation of the Colombian peso (which reduced the cost of imported grain).

The fifth-largest buyer of U.S. corn (after Korea), the European Union (EU) has 6.1 mmt of total U.S. corn commitments—up 62 percent from the same MY 2024/25 period and the highest in a decade.

Since MY 2024/25, China has purchased almost no U.S. corn. However, on May 17, the [White House announced](#) that China will buy at least \$17 billion per year of U.S. agricultural products in 2026 (prorated), 2027, and 2028. This commitment—which specifies corn among its list of products—is in addition to the soybean purchases China committed to in October 2025.

With 3 months until the end of the marketing year, 75 percent of projected U.S. corn sales are shipped, up 6 percent from same time last year. Of YTD U.S. corn exports sold to Mexico, Japan, and Colombia, 9.2 mmt remain unshipped—representing potential future transportation demand. These outstanding sales are up 24 percent from the same MY 2024/25 period.

Lowest Soybean Export Sales Since MY 2012/13

The May WASDE report lowered its projection of soybean exports by 0.27 mmt from the April projection. From MY 2024/25 to MY 2025/26, U.S. soybean exports are projected to decline 19 percent, in part because Brazil's bumper crop and Argentina's temporary elimination of its export tax made these countries' pricing more competitive. Over the same period, U.S. soybean exports are projected to rise in three of the top five markets: Egypt (+57 percent); Indonesia (+28 percent); and Japan (+8 percent) ([GTR table 16](#)). Although China remains the largest buyer of U.S. soybeans, and has met its initial commitment to buy 12 mmt after the October 2025 agreement, China's YTD total U.S. soybean commitments are down 47 percent from the same MY 2024/25 period.

Mexico, the second-largest buyer of U.S. soybeans, has 4.8 mmt in YTD total commitments, down 2 percent from the same period last year. Also, the EU's YTD total U.S. soybean commitments (of 4.2 mmt) are down 23 percent from the same time last year,

² Unless otherwise specified, outstanding export sales mentioned in this article refer to MY 2025/26. Total commitments to purchase U.S. grain (i.e., sales) include YTD accumulated exports, as well as MY 2025/26 purchase commitments that have not yet shipped—i.e., “outstanding sales”).

moving the EU from the spot of second- to fourth-largest buyer. The decline was driven by the EU's rising domestic [availability of alternative oilseeds](#) (particularly rapeseed) and the gradually slowing demand of the EU's livestock and biodiesel industries, particularly in the Netherlands and France.

Overall, YTD total soybean commitments and accumulated exports are down 18 percent and 20 percent, respectively, from the same MY 2024/25 period ([fig. 2](#)). With 3 months until the end of the marketing year, 85 percent of U.S. projected soybean exports have already shipped—down from 87 percent for the same YTD period last year. Outstanding U.S. soybean export sales are up 14 percent from the same time in MY 2024/25 ([fig. 1](#)). If these sales materialize, they can increase grain transportation demand.

Highest Wheat Export Shipments Since MY 2020/21

Total wheat accumulated exports for MY 2025/26, which ended on May 31, 2026, were 23.41 mmt, up 10 percent from MY 2024/25 and 1.36 mmt less than WASDE's projected exports for MY 2025/26.

This rise is mainly due to increased purchases by Mexico (+4 percent); Philippines (+3 percent); Indonesia (+31 percent); and Nigeria (+94 percent). For the second year in a row, China has purchased almost no U.S. wheat.

Grain Transportation Demand in MY 2025/26

Year to date as of May 30, barge shipments through the Mississippi River locks were down from the same MY 2024/25 period, despite higher corn and wheat demand. From the week ending September 6, 2025, to the week ending May 30, 2026 (compared to same MY 2024/25 period), barge movements through the Mississippi River locks were down 4 percent for corn and down 19 percent for soybeans. Similarly, from the week ending June 7, 2025, to the week ending May 30, 2026 (compared to the same MY 2024/25 period), barge movements through the Mississippi River locks were down 9 percent for wheat. Earlier this year, barge shipping was disrupted by various weather events, which limited barge capacity (with draft and tow restrictions in place) and raised barge rates.

In contrast, demand for rail transportation climbed with rising grain exports to Mexico and corn exports to the Pacific Northwest (PNW). From the week ending June 1, 2025, to the week ending May 28, 2026 (compared to the same MY 2024/25 period), inspections of wheat to Mexico by rail were up 2 percent. Also, from the week ending September 1, 2025, to the week ending May 28, 2026 (compared to the same MY 2024/25 period), corn inspections to Mexico by rail were up 24 percent. Comparing the same September-to-May periods (for the same

years), soybean inspections to Mexico by rail were up 2 percent. Similarly, from the week ending September 1, 2025, to the week ending May 28, 2026 (compared to the same MY 2024/25 period), total corn inspections to the PNW by rail were up 31 percent while total soybean inspections by rail to the PNW were down 47 percent.

From the week ending June 5, 2025, to the week ending May 28, 2026, an average of 29 oceangoing grain vessels were loaded weekly in the Gulf—4 percent more than the same MY 2024/25 period. From the week ending September 4, 2025, to the week ending May 28, 2026, an average of 30 oceangoing grain vessels were loaded weekly in the Gulf—1 percent more than the same MY 2024/25 period ([GTR fig. 19](#)).

Looking Ahead

Despite WASDE's projected 5-percent decline in corn exports (with lower production) from MY 2025/26 to MY 2026/27, they are still expected to be the second highest on record. [Mexico's U.S. corn purchases](#), already high, are projected to rise further as the country's domestic use is expected to increase 2 percent, while its domestic production declines 3 percent. U.S. wheat exports are projected to fall 15 percent, because of the lowest wheat production since MY 1972/73, higher U.S. prices, and abundant competitor supplies.

In MY 2026/27, soybean exports are expected to rise 6 percent with higher global soybean demand, though WASDE projects the U.S. share of global trade is likely to continue to decline long term, with competition from large South American supplies and strong U.S. domestic soybean crush demand that limits export growth.

As of May 28, total commitments for MY 2026/27 (currently, all unshipped) were 3.2 mmt for corn, 0.89 mmt for soybeans, and 3.9 mmt for wheat. Mexico's commitments accounted for large shares of all commodities, including 63 percent of total corn commitments, 25 percent of total soybean commitments, and 19 percent of total wheat

commitments. To the extent these exports materialize, they signal more demand for rail and barge transportation. Other factors that could raise grain transportation demand include increases in domestic soybean meal use, domestic ethanol production, and soybean oil exports.

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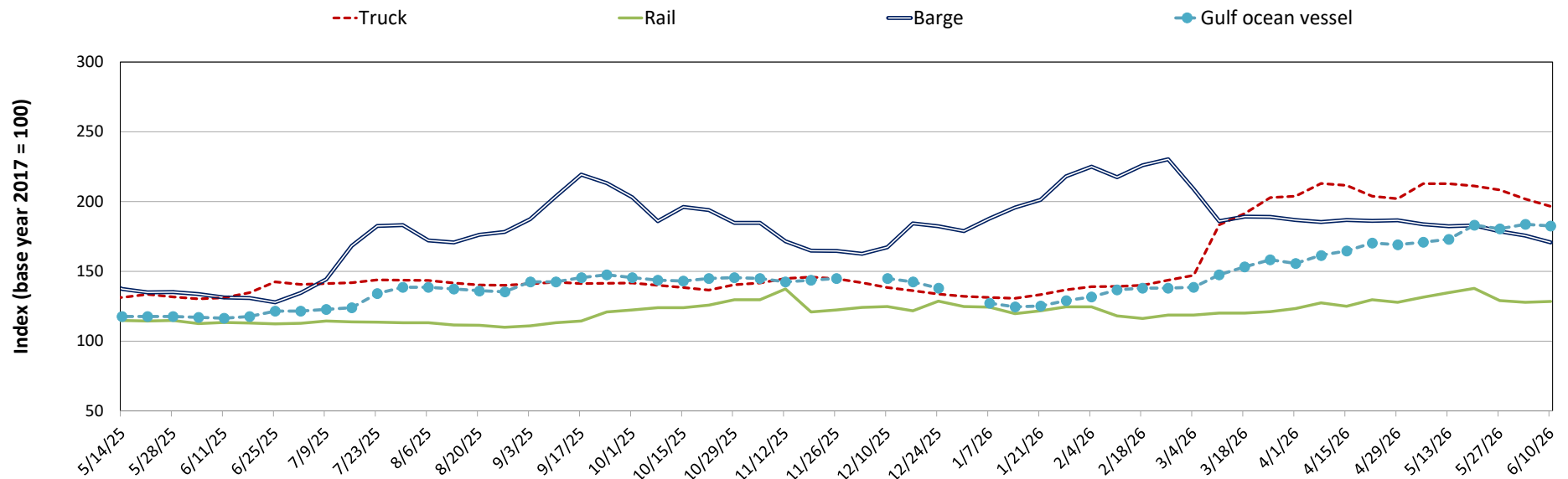
Grains are transported to the domestic and international markets via one or more of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
06/10/26	197	128	171	182	177
06/03/26	202	128	176	184	177
06/11/25	131	113	131	116	126

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.

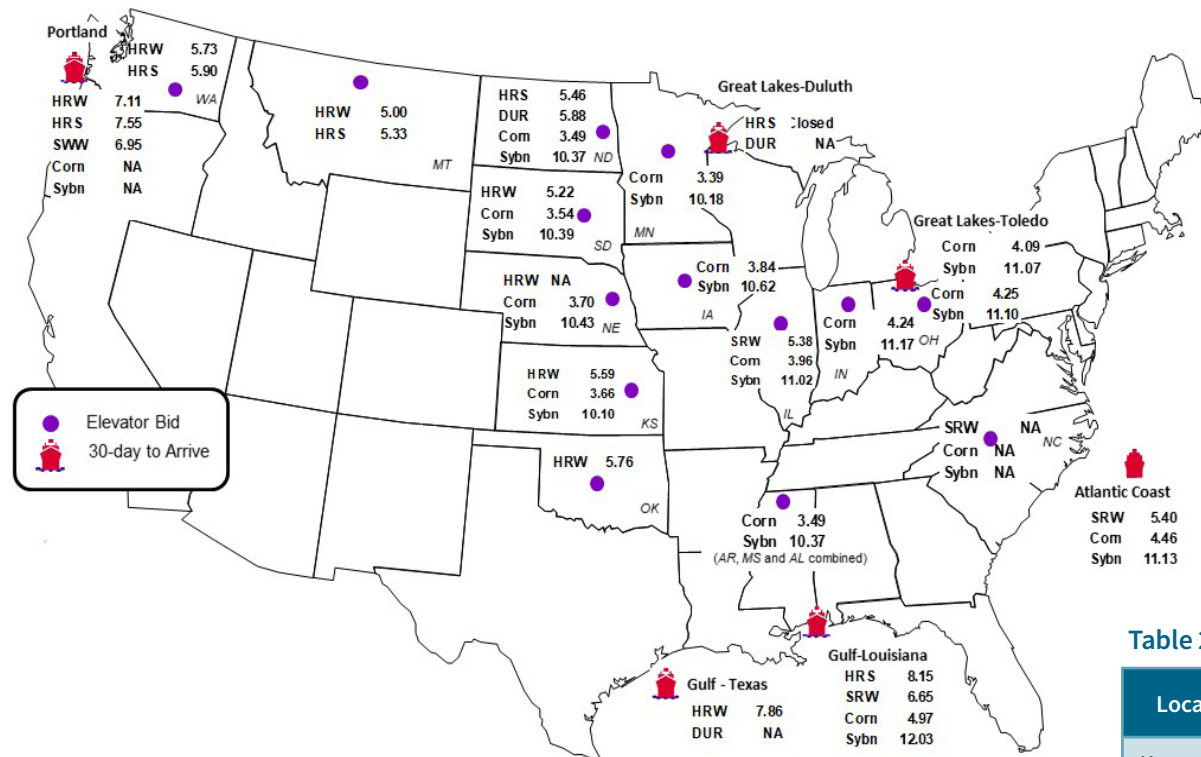
Figure 1. Grain transportation cost indicators as of week ending 06/10/26



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	6/5/2026	5/29/2026
Corn	IL-Gulf	-1.01	-0.97
Corn	NE-Gulf	-1.26	-1.26
Soybean	IA-Gulf	-1.41	-1.47
HRW	KS-Gulf	-2.27	-2.20
HRS	ND-Portland	-2.09	-2.04

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	6/5/2026	Week ago 5/29/2026	Year ago 6/06/2025
Kansas City	Wheat	July	6.208	6.496	5.424
Minneapolis	Wheat	July	6.195	6.638	6.352
Chicago	Wheat	July	5.800	6.106	5.454
Chicago	Corn	July	4.172	4.466	4.394
Chicago	Soybean	July	11.214	11.868	10.518

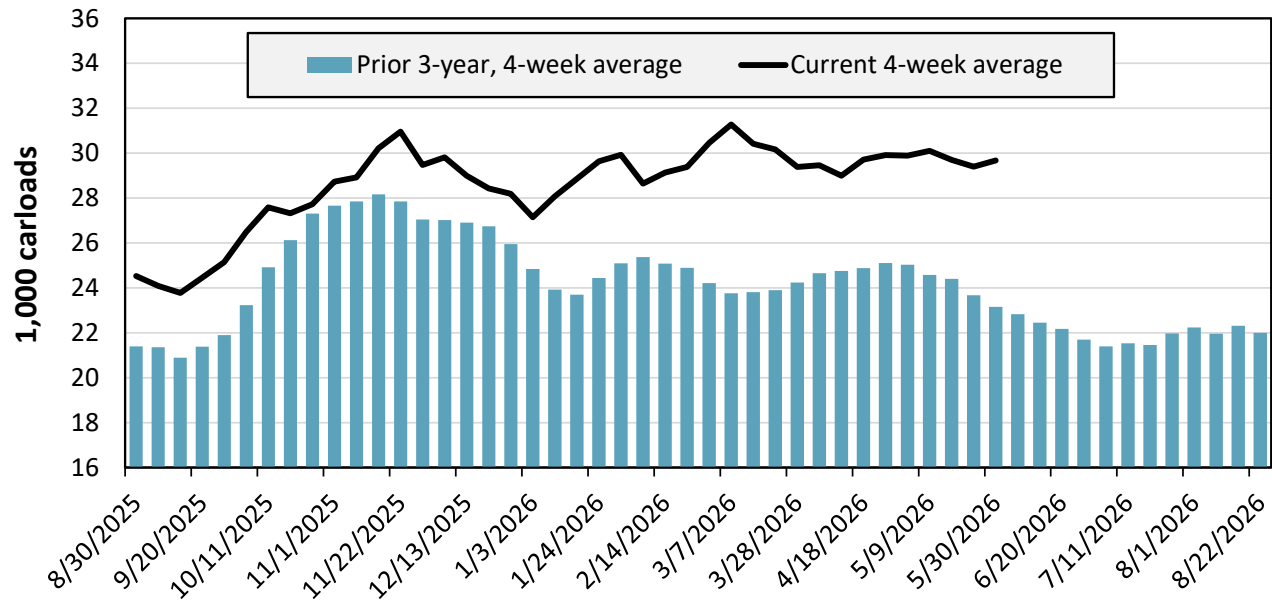
Sources: Chicago Mercantile Exchange (CME), Group Grain, and *Oilseed Futures Report*.

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

For the week ending: 5/30/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,441	2,785	14,995	7,308	3,503	1,673	31,705
This week last year	1,351	3,096	9,896	5,575	2,759	1,342	24,019
2026 YTD	31,768	55,548	279,329	148,529	75,604	37,229	628,007
2025 YTD	36,365	63,376	240,267	126,785	57,089	30,376	554,258
2026 YTD as % of 2025 YTD	87	88	116	117	132	123	113
Last 4 weeks as % of 2025	90	89	129	122	127	141	121
Last 4 weeks as % of 3-yr. avg.	89	95	135	129	146	164	128
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 30, grain carloads were up 1 percent from the previous week, up 21 percent from last year, and up 28 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: 5/29/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	29.6	23.9	26.1	14.2	12.7	12.4	19.8
	Average over last 4 weeks	25.5	25.3	29.4	16.0	12.9	11.8	20.2
	Average of same 4 weeks last year	26.6	30.2	19.0	15.6	6.8	n/a	19.6
Average grain unit train speeds (miles per hour)	This week	22.8	18.6	24.0	23.7	21.2	21.2	21.9
	Average over last 4 weeks	23.1	17.1	23.5	23.6	22.9	20.3	21.7
	Average of same 4 weeks last year	21.5	19.4	25.6	22.9	24.7	n/a	22.8

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

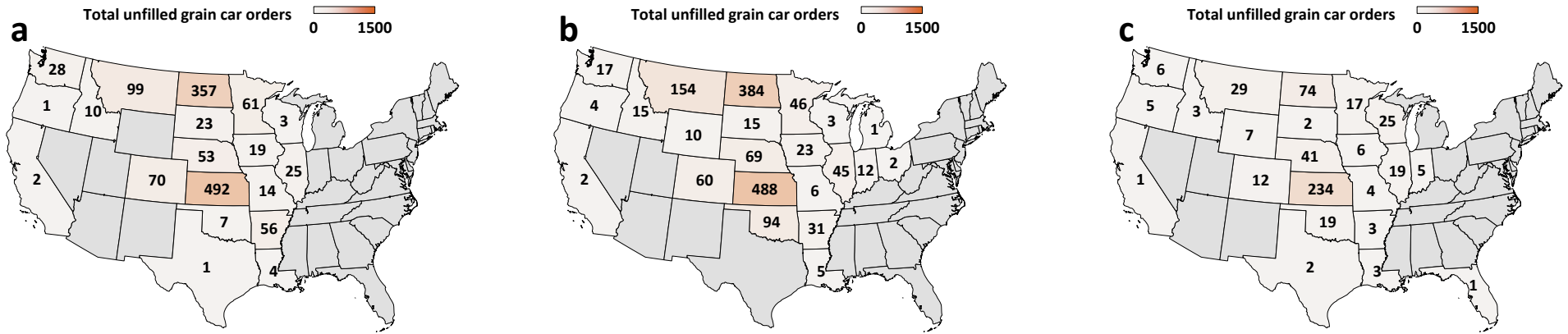
For the week ending: 5/29/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	38	17	254	54	11	167	542
	Average over last 4 weeks	55	15	337	56	8	152	620
	Average of same 4 weeks last year	24	7	220	84	7	n/a	342
Average number of loaded grain cars not moved in over 48 hours	This week	39	112	369	51	57	140	767
	Average over last 4 weeks	79	149	535	48	17	154	981
	Average of same 4 weeks last year	37	179	327	66	3	n/a	612
Average number of grain unit trains held	This week	1	0	5	2	0	3	11
	Average over last 4 weeks	1	0	6	4	0	4	14
	Average of same 4 weeks last year	0	0	3	4	0	n/a	8
Total unfilled manifest grain car orders	This week	6	0	594	598	0	127	1,325
	Average over last 4 weeks	38	1	625	623	0	208	1,495
	Average of same 4 weeks last year	6	7	126	312	0	n/a	451

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](#).

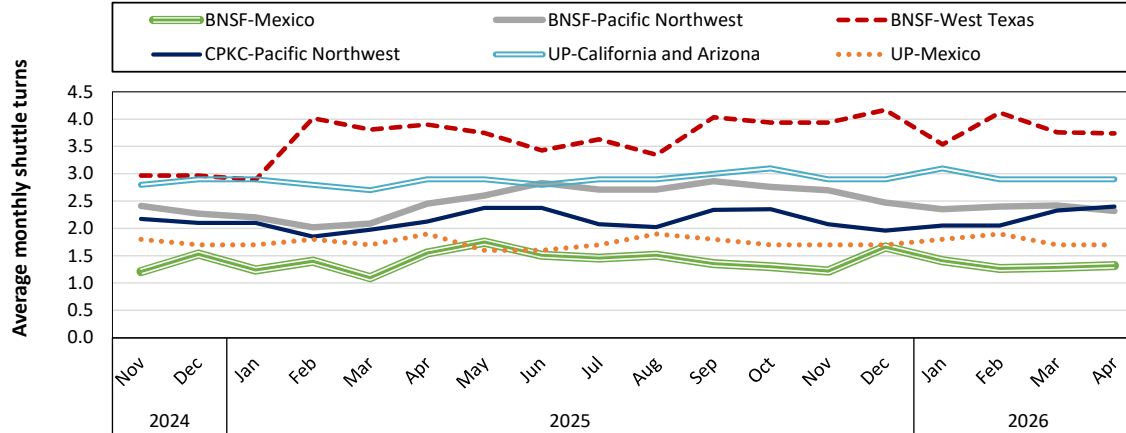
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 5/29/2026 (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

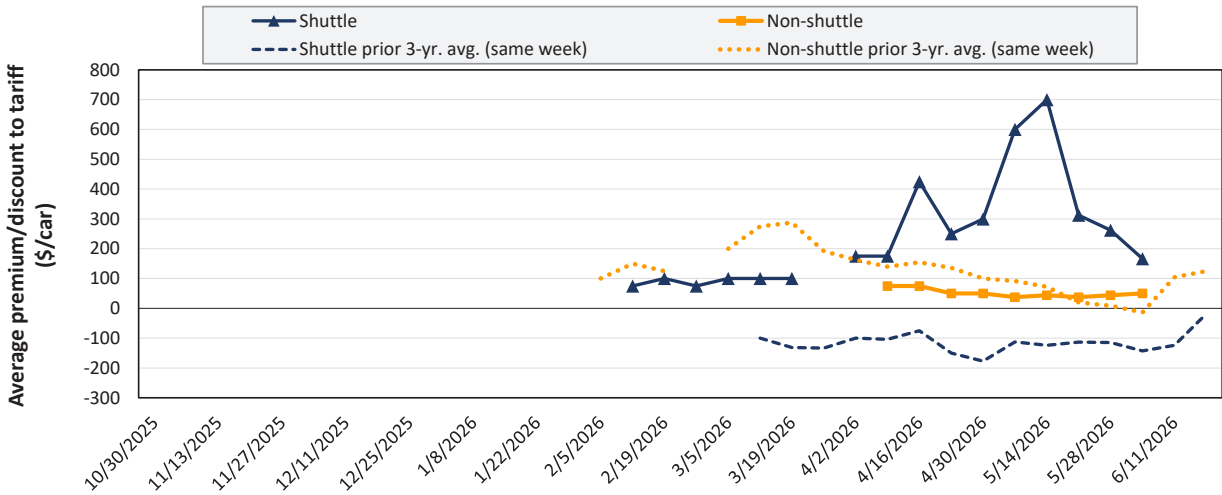


In April 2026, BNSF Railway's average monthly grain shuttle turns were 1.3 to Mexico, 2.3 to the Pacific Northwest, and 3.7 to West Texas. CPKC's shuttle turns averaged 2.4 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.7 to 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](https://www.agtransport.com/). BNSF = BNSF Railway; CPKC = Canadian Pacific Kansas City; UP = Union Pacific Railroad.
Source: Surface Transportation Board.

Railroads periodically auction guaranteed grain car service for an individual trip or a period of time (e.g., 1 year). This ordering system is referred to as the “primary market.” Once grain shippers acquire guaranteed freight on the primary market, they can trade that freight with other shippers through a broker. These transactions are referred to as the “secondary market.” Secondary rail values are indicators of rail service quality and demand/supply. The values published herein are market indicators only and do not represent guaranteed prices.

Figure 6. Secondary market bids/offers for railcars to be delivered in June 2026



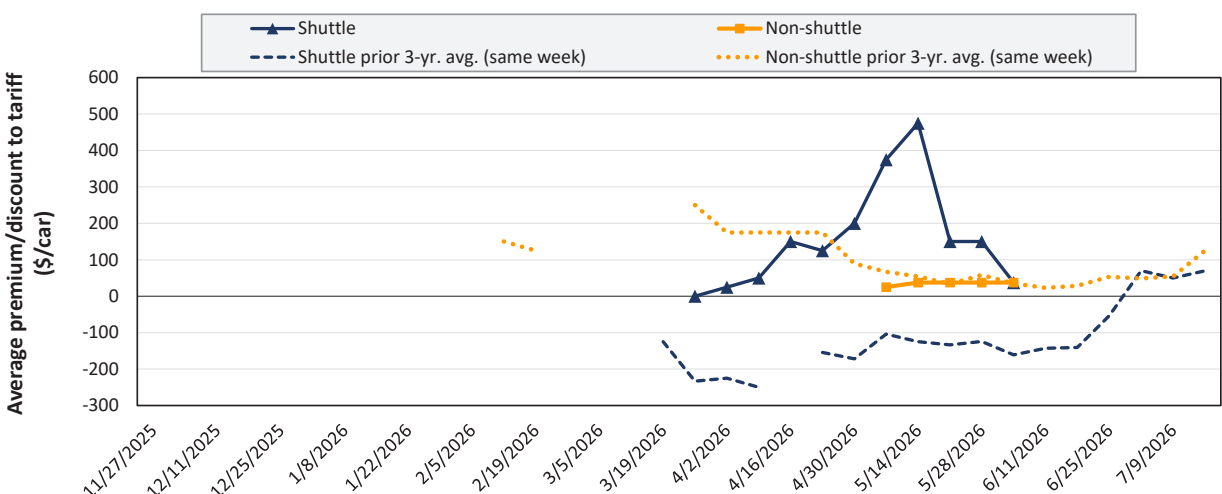
Average non-shuttle bids/offers rose \$6 this week, and are \$25 below the peak.

Average shuttle bids/offers fell \$96 this week and are \$533 below the peak.

6/4/2026	BNSF	UP
Non-Shuttle	\$50	\$50
Shuttle	\$383	-\$50

Note: Shuttle bids/offers are for shuttle trains—110+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service.
n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service analysis of data from the Malsam Company.

Figure 7. Secondary market bids/offers for railcars to be delivered in July 2026



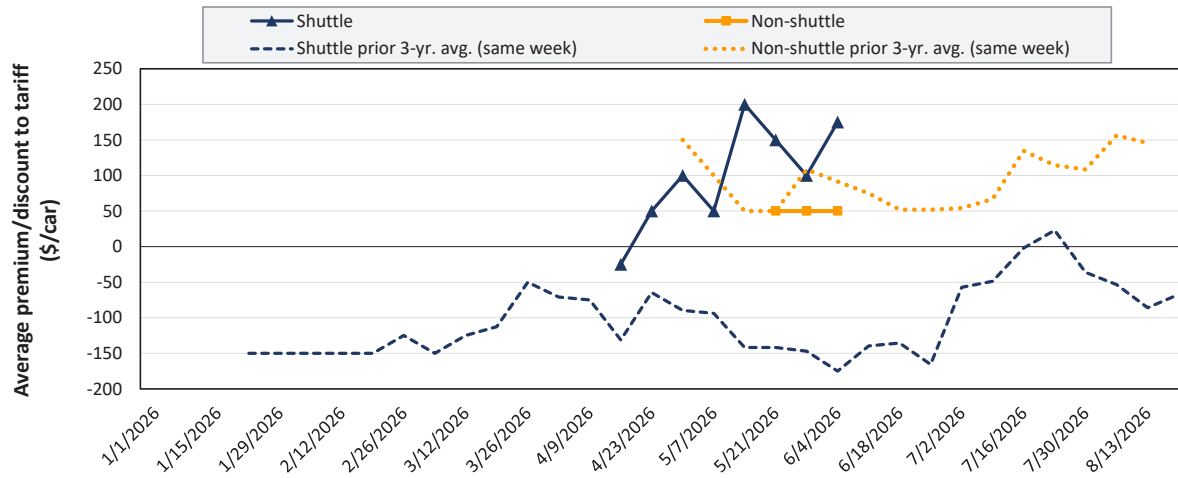
Average non-shuttle bids/offers are unchanged this week, and are at the peak.

Average shuttle bids/offers fell \$113 this week and are \$438 below the peak.

6/4/2026	BNSF	UP
Non-Shuttle	\$50	\$25
Shuttle	\$225	-\$150

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 rose \$75 this week and are \$25 below the peak.

6/4/2026	BNSF	UP
Non-Shuttle	\$50	\$50
Shuttle	\$175	n/a

Note: Shuttle bids/offers are for shuttle trains—110+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service analysis of data from the Malsam Company.

Table 5. Weekly secondary railcar market (dollars per car)

For the week ending: 6/4/2026		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	-50	-50	-50	n/a	n/a	n/a
	UP	50	25	50	n/a	n/a	n/a
	Change from last week	12	0	n/a	n/a	n/a	n/a
	Change from same week 2025	200	75	0	n/a	n/a	n/a
Shuttle	BNSF	383	225	175	n/a	1,250	n/a
	Change from last week	-67	-75	75	n/a	0	n/a
	Change from same week 2025	275	256	250	n/a	400	n/a
	UP	-50	-150	n/a	n/a	n/a	n/a
	Change from last week	-125	-150	n/a	n/a	n/a	n/a
	Change from same week 2025	167	100	n/a	n/a	n/a	n/a
	CPKC	150	50	50	n/a	n/a	n/a
	Change from last week	50	-50	-50	n/a	n/a	n/a
	Change from same week 2025	250	150	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.

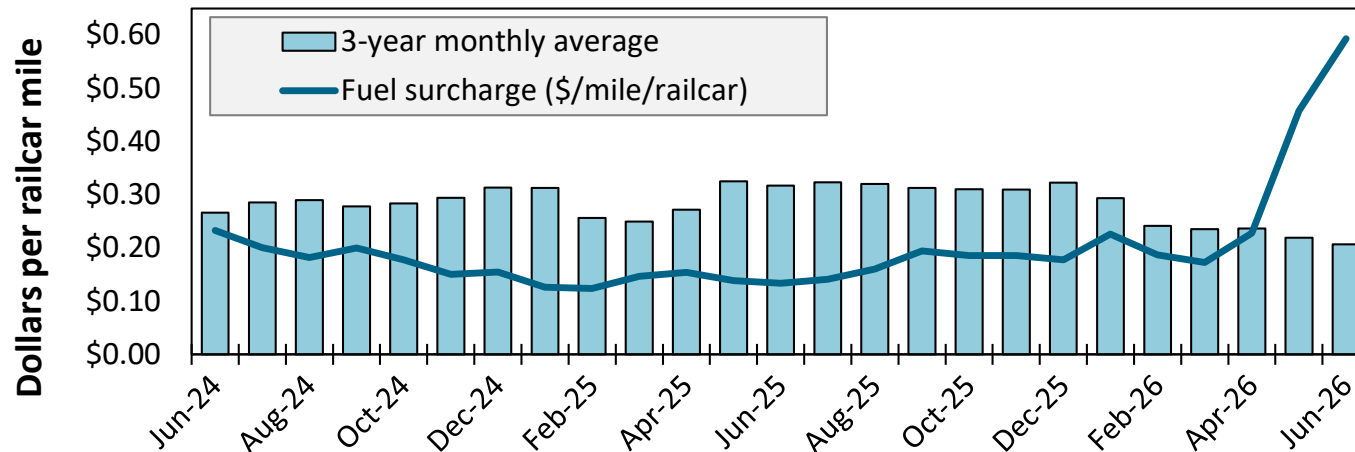
Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, June 2026

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 Y/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
Soybeans	UP	Sterling, IL	Eagle Pass, TX	Shuttle	\$4,655	\$915	\$5,570	\$1.39	\$54.82	7.1
	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
Wheat	UP	Roelyn, IA	Eagle Pass, TX	Shuttle	\$5,035	\$878	\$5,913	\$1.58	\$58.20	-12.0
	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).

Figure 9. Railroad fuel surcharges, North American weighted average

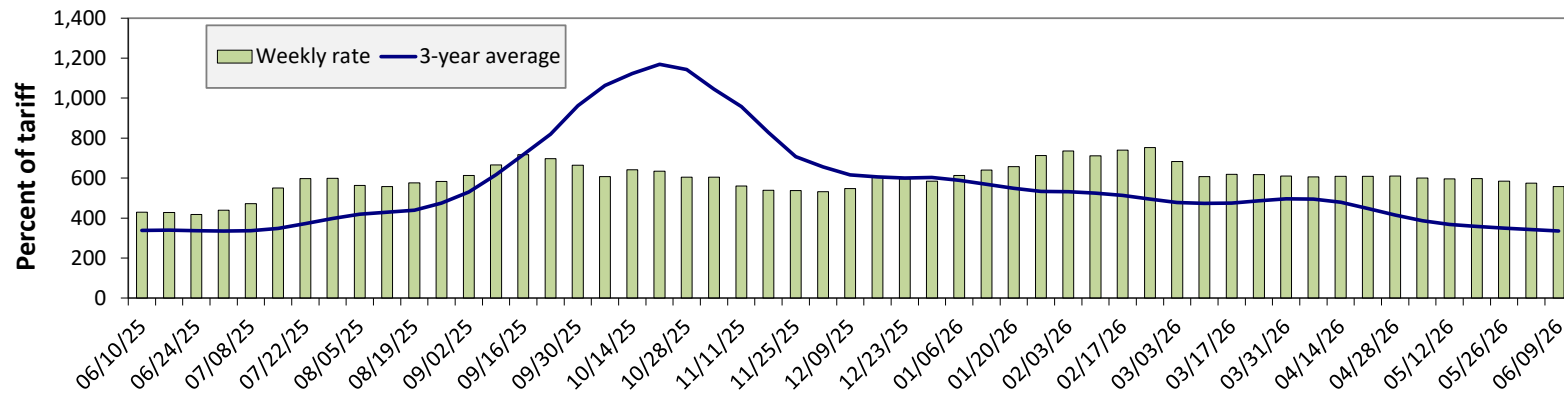


June 2026: \$0.59/mile, up 13 cents from last month's surcharge of \$0.46/mile; up 46 cents from the June 2025 surcharge of \$0.13/mile; and up 38 cents from the June prior 3-year average of \$0.21/mile.

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 Kansas City Railway, Union Pacific Railroad, Norfolk Southern Corporation.

Figure 10. Illinois River barge freight rate



For the week ending June 9: 3 percent lower than the previous week; 30 percent higher than last year; and 66 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	6/9/2026	679	575	558	404	386	374
	6/2/2026	678	594	574	409	388	372
\$/ton	6/9/2026	42.03	30.59	25.89	16.12	18.10	11.74
	6/2/2026	41.97	31.60	26.63	16.32	18.20	11.68
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	35	25	30	33	20	30
	3-year avg.	67	59	66	64	45	59
Rate	July	674	579	559	408	389	367
	September	782	756	743	746	744	754

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](#).

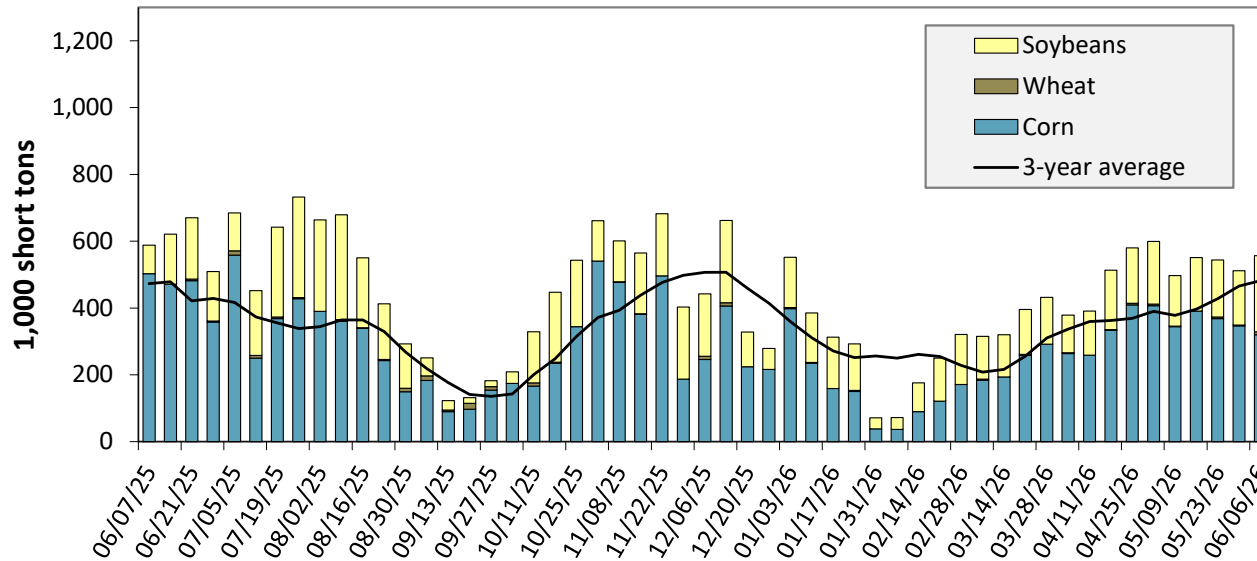
Source: USDA, Agricultural Marketing Service.

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 June 6: 5 percent lower than last year and 16 percent higher than the 3-year average.

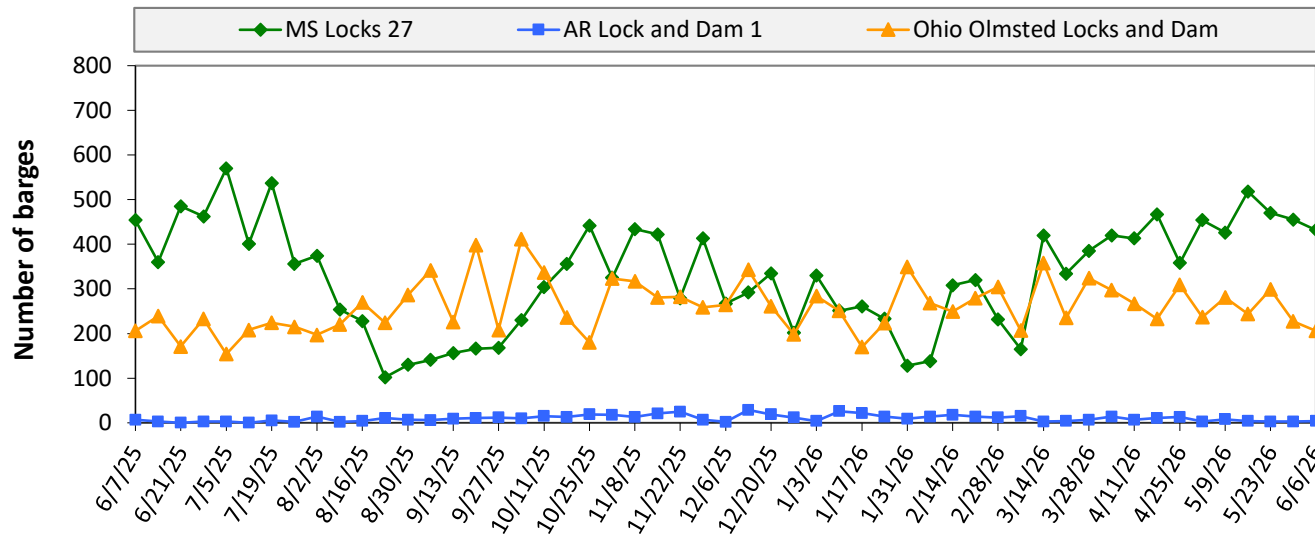
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 06/06/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	166	9	78	0	253
Mississippi River (Winfield, MO (L25))	206	9	147	0	361
Mississippi River (Alton, IL (L26))	313	9	221	0	544
Mississippi River (Granite City, IL (L27))	320	9	228	0	557
Illinois River (La Grange)	105	0	63	0	168
Ohio River (Olmsted)	49	0	45	0	94
Arkansas River (L1)	1	9	7	0	17
Weekly total - 2026	370	18	280	0	668
Weekly total - 2025	583	36	106	2	726
2026 YTD	7,258	386	4,716	45	12,405
2025 YTD	9,032	463	4,656	99	14,250
2026 as % of 2025 YTD	80	83	101	45	87
Last 4 weeks as % of 2025	67	77	160	102	85
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.

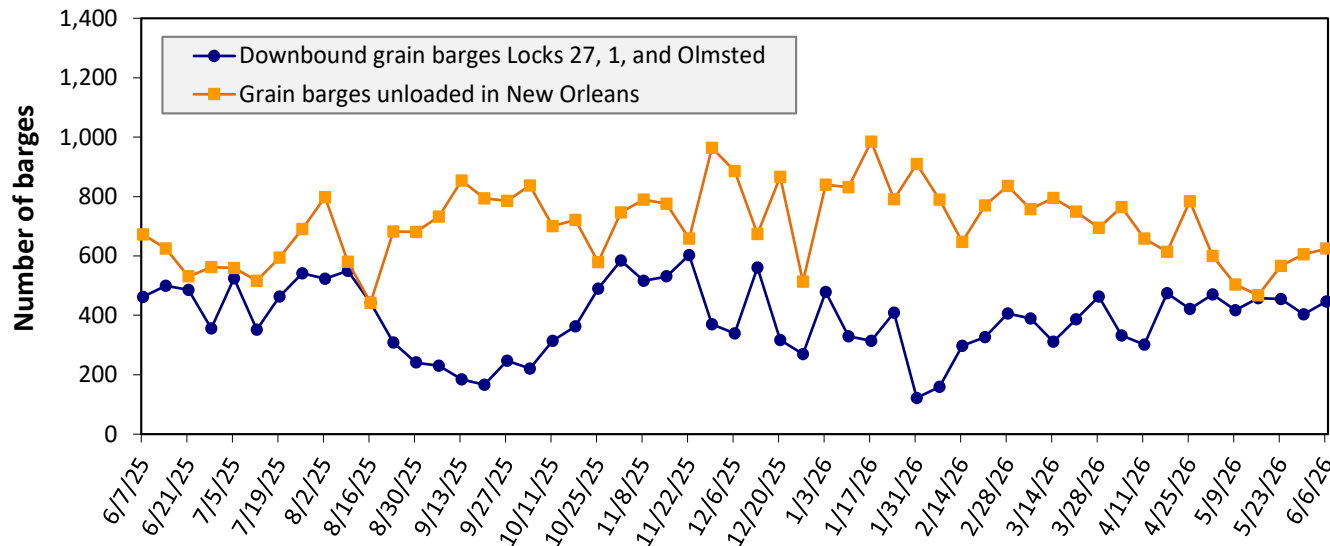
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending June 6: 642 barges transited the locks, 43 barges fewer than the previous week, and 24 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 June 6: 446 barges moved down river, 42 more than the previous week; 624 grain barges unloaded in the New Orleans Region, 3 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.

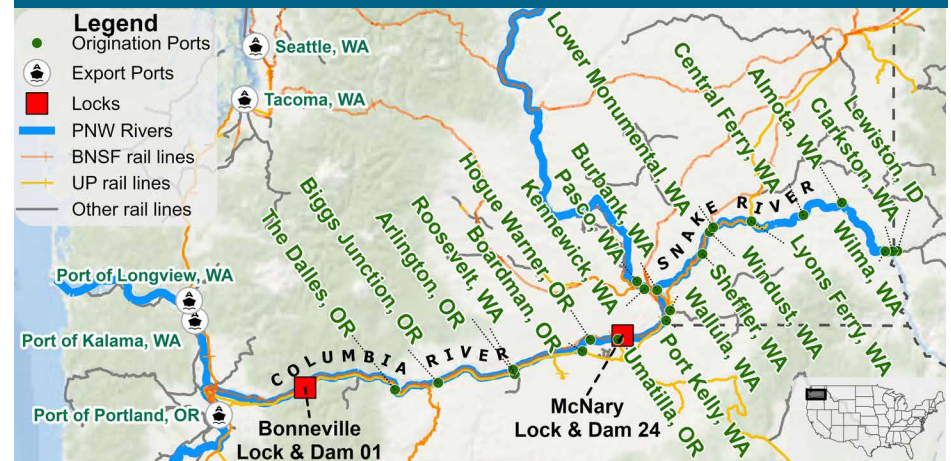
Table 12. Monthly barged grain movements, Columbia-Snake (1,000 tons)

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.

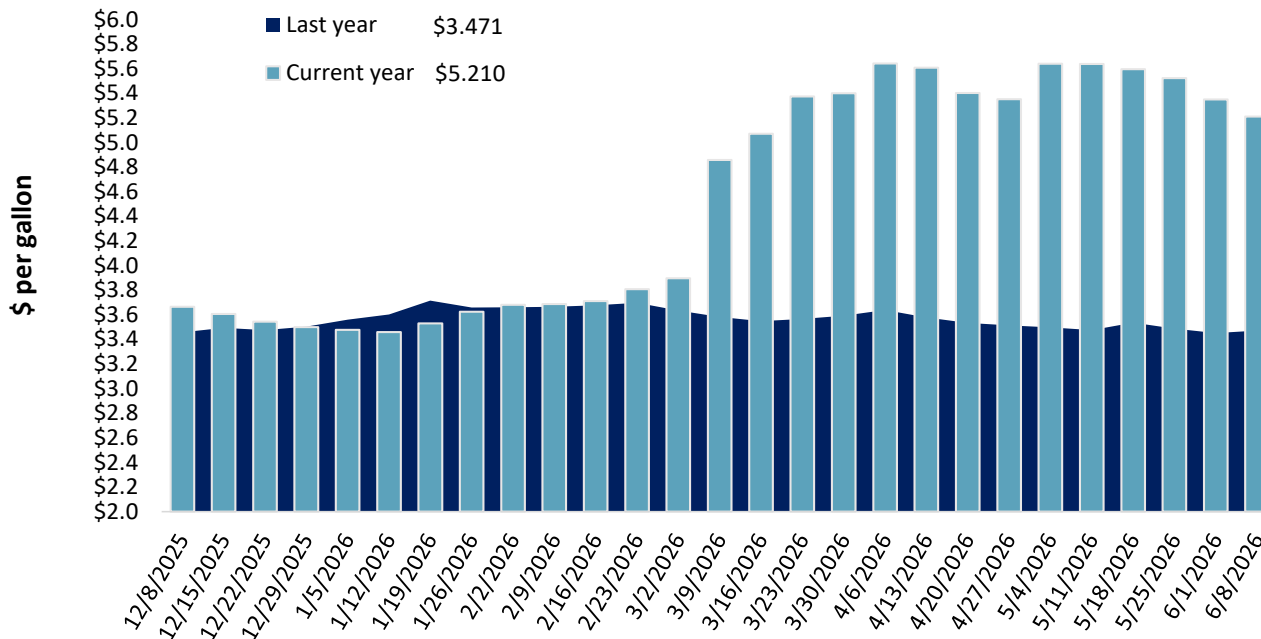
Table 13. Retail on-highway diesel prices, week ending 6/08/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	5.149	-0.088	1.624
	New England	5.626	-0.105	1.742
	Central Atlantic	5.568	-0.126	1.807
	Lower Atlantic	4.943	-0.073	1.544
II	Midwest	5.812	0.420	2.383
III	Gulf Coast	4.786	-0.114	1.677
IV	Rocky Mountain	5.200	-0.131	1.719
V	West Coast	6.289	-0.109	2.072
	West Coast less California	5.725	-0.107	1.961
	California	6.940	-0.111	2.201
Total	United States	5.210	-0.140	1.739

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 8, the U.S. average diesel fuel price decreased 14.0 cents from the previous week to \$5.21 per gallon, 173.9 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 06/04/2026	928	734	1,314	1,235	115	4,326	18,269	4,163	26,758
	This week year ago	2,313	1,072	1,495	829	85	5,794	14,388	3,593	23,775
	Last 4 wks. as % of same period in prior marketing year	28	29	43	62	50	37	136	126	110
Current shipped (cumulative) exports sales	Current MYTD	132	34	58	25	17	266	64,498	35,996	100,760
	Prior MYTD	12	21	63	19	0	116	51,541	44,996	96,653
	Cuurent MYTD as % of prior MYTD	1,063	159	92	133	0	230	125	80	104
	Total 2024/25	5,377	3,106	6,560	5,730	335	21,107	69,081	50,106	140,295
	Total 2023/24	3,535	4,260	6,314	3,906	526	18,540	54,277	44,510	117,328

Note: The marketing year for wheat is June 1 to May 31 and, for corn and soybeans, September 1 to August 31. YTD = year-to-date. wks. = weeks. MYTD = marketing year to date.

Source: USDA, Foreign Agricultural Service.

Table 15. Top 5 importers of U.S. corn

For the week ending 6/04/2026	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	2,099	23,546	21,631	9	19,839
Japan	829	14,849	11,773	26	10,478
Colombia	281	7,686	6,863	12	5,493
China	0	0	33	-100	3,461
Korea	204	8,583	5,455	57	3,127
Top 5 importers	3,413	54,664	45,755	19	42,399
Total U.S. corn export sales	4,124	82,767	65,929	26	54,276
% of YTD current month's export projection	5%	99%	91%	-	-
Change from prior week	927	1,000	791	-	-
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 6/04/2026	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	11,956	22,479	-47	26,078
Mexico	222	4,828	4,898	-1	4,762
Japan	75	2,081	1,907	9	2,107
Egypt	0	4,720	3,028	56	2,098
Indonesia	24	2,201	1,775	24	1,997
Top 5 importers	321	25,785	34,087	-24	37,042
Total U.S. soybean export sales	1,032	40,159	48,590	-17	48,941
% of YTD current month's export projection	2%	96%	95%	-	-
Change from prior week	142	211	61	-	-
Top 5 importers' share of U.S. soybean export sales	31%	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 6/04/2026	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2023-25 (1,000 mt)
	YTD MY 2026/27	YTD MY 2025/26		
Mexico	885	1,128	-22	3,720
Philippines	753	505	49	2,677
Japan	496	483	3	2,050
Korea	586	308	90	1,881
Taiwan	276	203	36	1,005
Nigeria	52	235	-78	878
China	NA	NA	NA	863
Indonesia	65	214	-70	746
Thailand	119	116	2	690
Vietnam	10	95	-89	581
Top 10 importers	3,241	3,287	-1	15,091
Total U.S. wheat export sales	4,592	5,910	-22	20,967
% of YTD current month's export projection	22%	24%	-	-
Change from prior week	666	389	-	-
Top 10 importers' share of U.S. wheat export sales	71%	56%	-	72%
USDA forecast, May 2026	21,092	24,766	-15	-

Note: The top 10 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2025/26 (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)

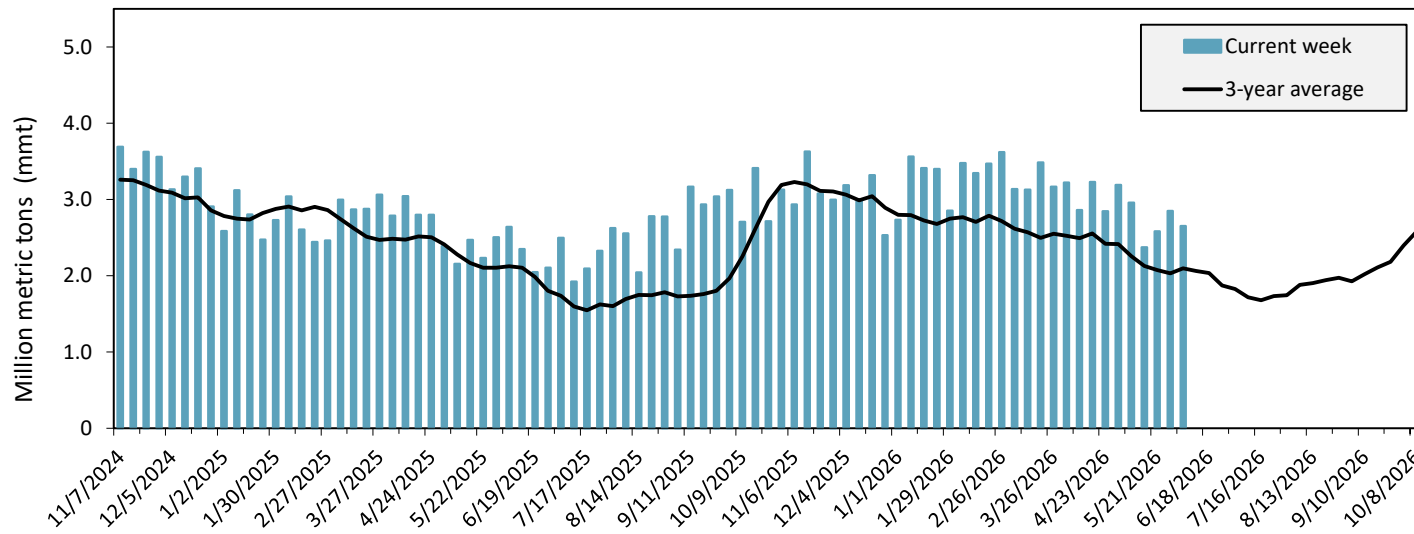
Port regions	Commodity	For the week ending 06/04/2026	Previous week	Current week as % of previous	2026 YTD	2025 YTD	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	515	625	82	11,559	11,285	102	123	141	24,214
	Soybeans	68	77	88	4,027	1,966	205	n/a	n/a	2,957
	Wheat	121	246	49	4,391	4,903	90	67	75	12,271
	All grain	704	948	74	20,133	18,248	110	125	136	39,721
Mississippi Gulf	Corn	1,065	683	156	16,861	16,611	102	86	102	37,115
	Soybeans	162	282	57	11,334	9,985	114	116	126	23,350
	Wheat	70	37	187	1,353	1,501	90	70	82	3,980
	All grain	1,297	1,002	129	29,549	28,097	105	90	105	64,484
Texas Gulf	Corn	62	13	462	687	116	594	n/a	549	590
	Soybeans	0	0	n/a	100	106	94	n/a	n/a	1,431
	Wheat	62	34	184	1,676	1,535	109	59	103	4,690
	All grain	124	227	55	5,422	1,895	286	140	153	7,774
Interior	Corn	237	399	59	6,922	5,744	121	105	121	15,546
	Soybeans	114	144	79	3,170	2,932	108	117	142	7,713
	Wheat	44	85	51	1,357	1,316	103	110	122	3,104
	All grain	417	639	65	11,708	10,256	114	108	128	26,888
Great Lakes	Corn	0	0	n/a	218	0	n/a	n/a	548	414
	Soybeans	0	0	n/a	20	0	n/a	n/a	0	63
	Wheat	23	0	n/a	135	104	130	156	118	434
	All grain	23	0	n/a	373	104	359	350	192	911
Atlantic	Corn	32	30	107	765	161	475	736	n/a	607
	Soybeans	2	3	72	545	450	121	472	320	1,085
	Wheat	0	0	n/a	6	34	18	0	0	81
	All grain	34	33	104	1,316	645	204	525	573	1,773
All Regions	Corn	1,911	1,750	109	37,012	33,916	109	105	122	78,486
	Soybeans	398	505	79	19,654	15,543	126	169	188	36,852
	Wheat	320	403	79	8,919	9,393	95	73	87	24,560
	All grain	2,652	2,848	93	68,959	59,349	116	109	125	141,804

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.

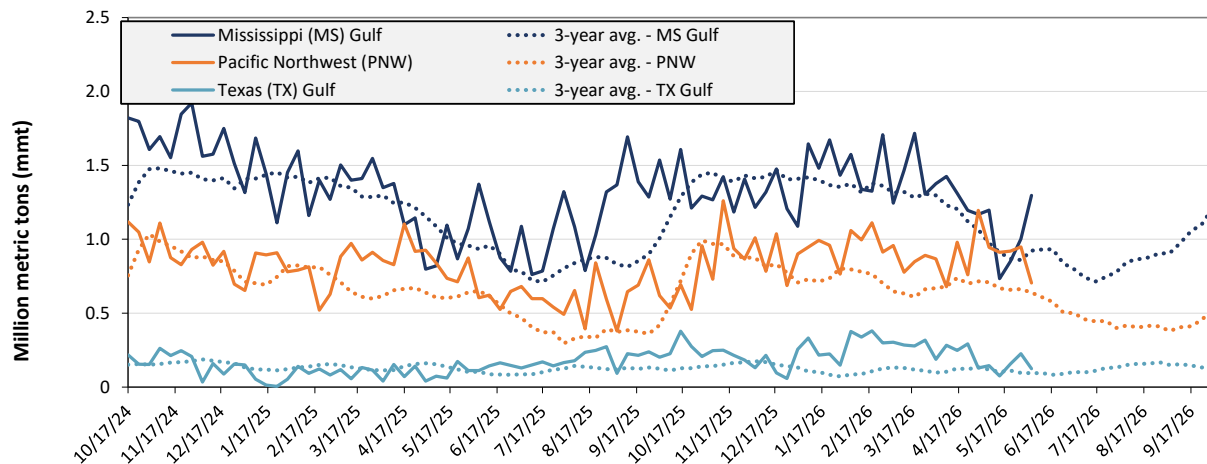
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending June 04: 2.7 mmt of grain inspected, down 7 percent from the previous week, up 5 percent from the same week last year, and up 26 percent from the 3-year average.

Note: 3-year average consists of 4-week running average.
Source: USDA, Federal Grain Inspection Service.

Figure 18. U.S. grain inspections for U.S. Gulf and PNW (wheat, corn, and soybeans)



Week ending 06/04/26 inspections (mmt):

MS Gulf: 1.3

PNW: 0.7

TX Gulf: 0.12

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 29	down 45	up 16	down 26
Last year (same 7 days)	down 4	up 97	unchanged	up 23
3-year average (4-week moving average)	up 41	up 30	up 40	up 10

Source: USDA, Federal Grain Inspection Service.

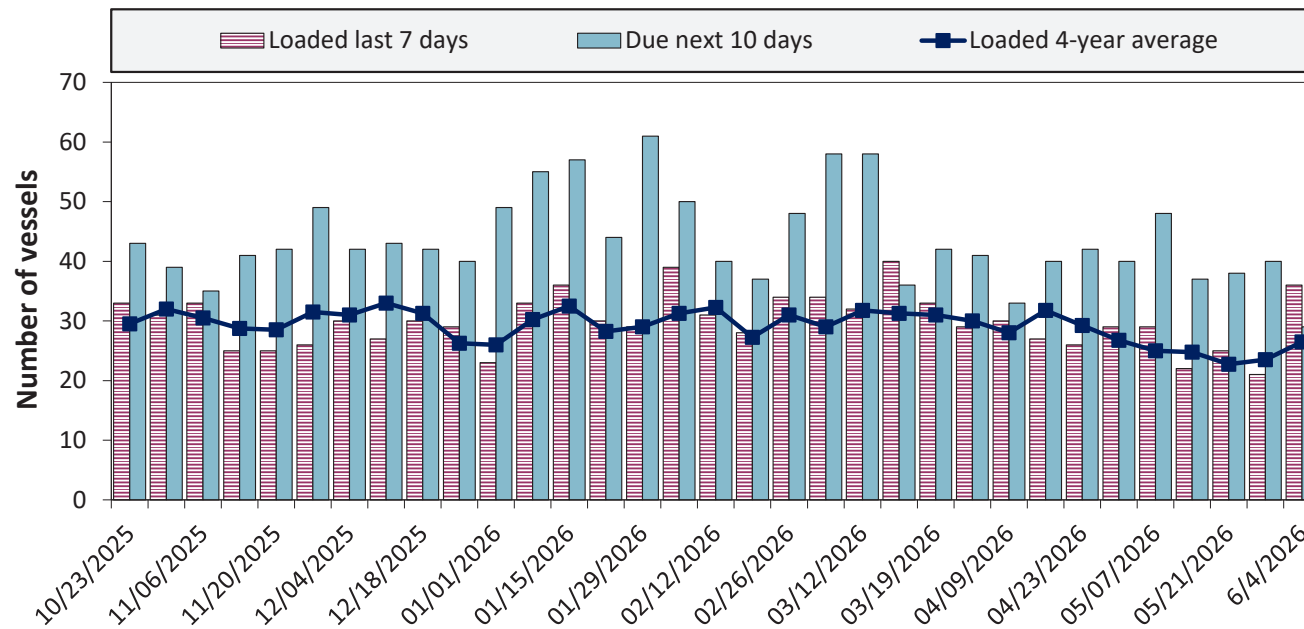
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
6/4/2026	20	36	29	18
5/28/2026	32	21	40	14
2025 range	(12...40)	(11...37)	(26...55)	(5...25)
2025 average	28	28	45	13

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

Source: USDA, Agricultural Marketing Service.

Figure 19. U.S. Gulf vessel loading activity

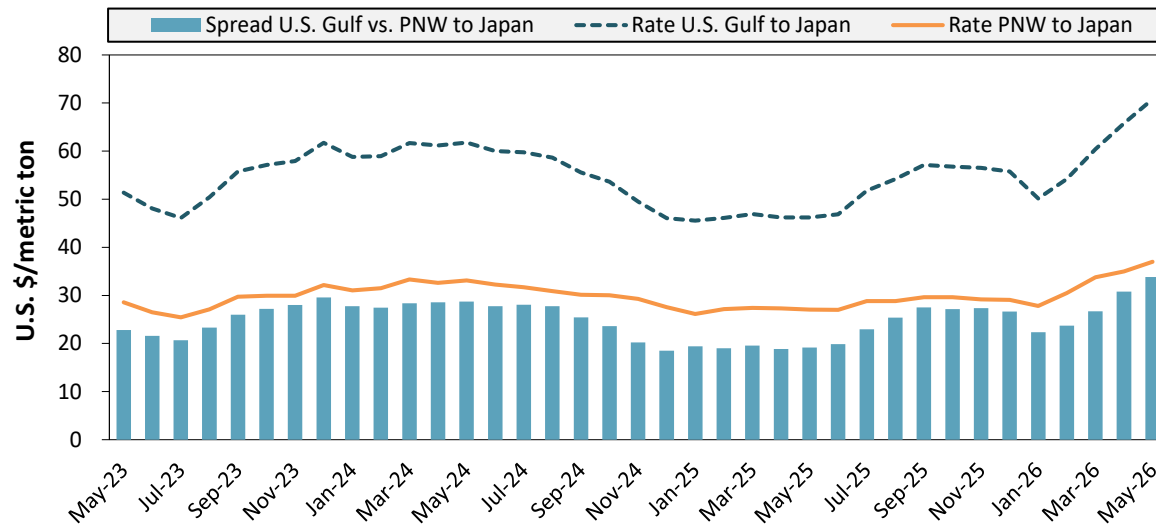


Note: U.S. Gulf includes Mississippi, Texas, and the East Gulf region.

Source: USDA, Agricultural Marketing Service.

Week ending 06/04/26, number of vessels	Loaded	Due
Change from last year	13%	-34%
Change from 4-year average	36%	-17%

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 06/06/2026

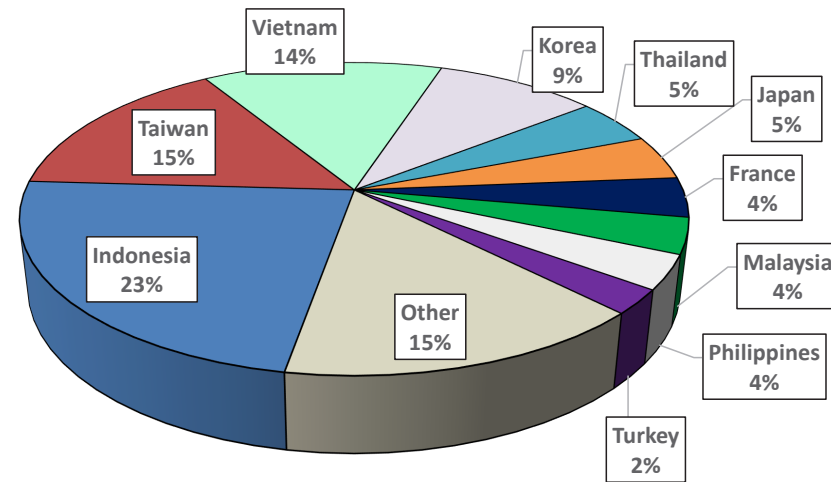
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Colombia	Soybean meal	Mar 24, 2026	May 1/10, 2026	50,000	31.60
PNW	Japan	Heavy grain	May 21, 2026	Jun 20/Jul 21, 2026	65,000	47.25
PNW	Bangladesh	Soybeans	Mar 11, 2026	May 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, PNW = Pacific Northwest.

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.

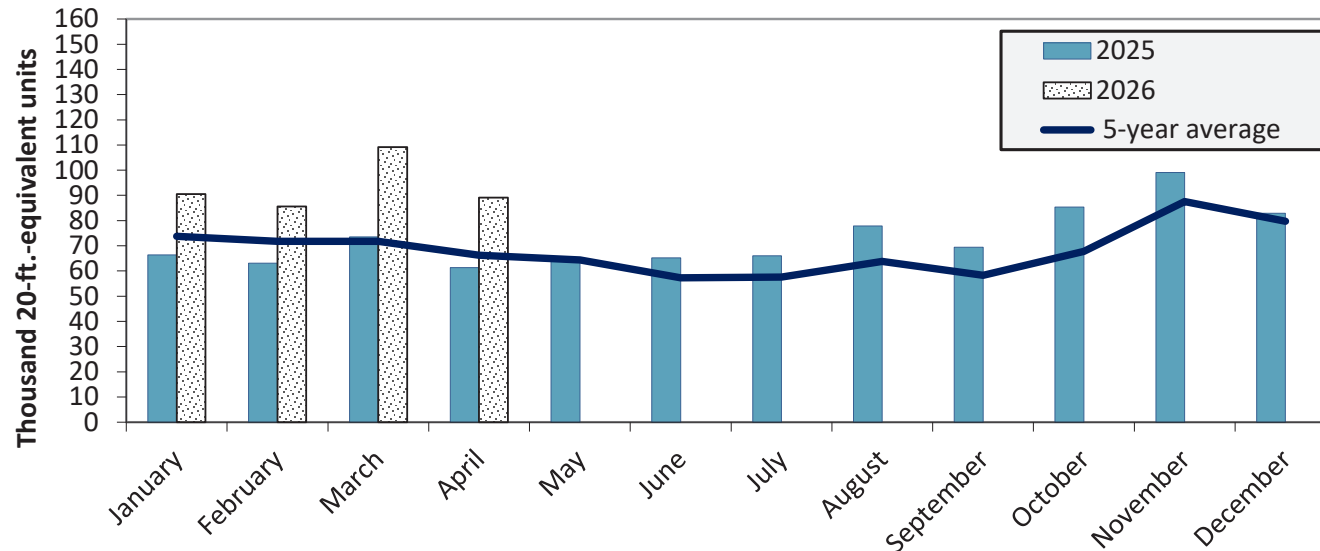
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Apr 2026



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 PIERS data, S&P Global.

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



Containerized grain shipments in April 2026 were up 45.2 percent from last year and up 34.5 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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