



Grain Transportation Report

Contents

Weekly Highlights.....	2
Snapshots by Sector.....	3
Feature Article.....	4
Grain Transportation Indicators	7
Rail Transportation.....	9
Barge Transportation.....	17
Truck Transportation	21
Grain Exports	22
Ocean Transportation.....	26
Contacts and Links.....	29

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Panama Canal Announces Additional Draft Restrictions. For vessels transiting the neopanamax locks, the Panama Canal Authority will lower the [maximum authorized draft](#) to 49 feet on July 24, and further lower it to 48.5 feet, starting on August 15. The current maximum authorized draft for the neopanamax locks is 49.5 feet—which took effect on July 3 ([Grain Transportation Report \(GTR\), June 11, 2026, first highlight](#)). No draft restrictions are planned for the panamax locks, which are transited by most dry bulk vessels carrying grain.

These draft restrictions come amid the development of an El Niño weather pattern in the Pacific Ocean—which [historically is associated](#) with low rainfall totals in Panama. Canal operations rely on freshwater from nearby lakes. The current 84.8-foot [water level](#) of Gatun Lake (the largest nearby lake) is projected to fall to below 84 feet by mid-August. In July 2023, the lake's water level fell to 79.2 feet.

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 ([GTR, November 23, 2023](#)).

No Wheat Exports Left From PNW Last Week. For only the third week on [record](#), the Pacific Northwest (PNW) export terminals had no wheat export inspections. Before last week, the only other weeks when the PNW exported no wheat were the last week of 2022 and a week in October 2002 (during a 10-day West Coast port stoppage).

In the week ending July 2, wheat inspected for export totaled just 134,000 metric tons (mt) ([GTR table 18](#)). Down 64 percent from the prior 5-year average (for the same week), this weekly wheat-export total is the sixth lowest since records began in 1983. By port region, 82,300 mt was exported from the Mississippi River; 38,300 mt, from the Interior; 10,900 mt, from North Texas; and 2,200 mt, from the South Atlantic.

Kansas Offers \$10 Million For Short Line Railroad Improvement Projects. The Kansas Department of Transportation (KDOT) [is accepting](#) applications for \$10 million of funding through the State's Rail Service Improvement Program. Applicants are required to provide 30 percent of the total project cost.

Qualified applicants include any short line railroad (i.e., Class II or Class III railroad); a Kansas port authority; or any owner or lessee of an industry track located on or adjacent to a short line railroad in Kansas. Last year's grant recipients included six short line railroads and three grain companies/cooperatives ([GTR, February 12, 2026, second highlight](#)).

Applications are due by noon on August 31. A link to the application can be found on KDOT's [website](#).

FMCSA Extends Hours-of-Service Regs for Hauling Feed. On June 12, the Federal Motor Carrier Safety Administration (FMCSA) [extended](#) Nebraska's emergency hours-of-service waiver for a fourth time. FMCSA's action is in response to Nebraska's urgent need for hauling of livestock feed from ever-greater distances: wildfires have burned more than 1 million acres in Nebraska, and the State faces severe drought conditions.

Effective until July 14 unless modified or terminated earlier by FMCSA, the waiver is intended to expedite transport of feed and other critical supplies. Motor carriers operating under the waiver must obtain the required over-dimension or overweight permits from Nebraska's Department of Transportation, and the fees for these permits are also temporarily waived.

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 July 2, [unshipped balances](#) of corn and soybeans totaled 17.9 million metric tons (mmt), down 9 percent from last week and up 14 percent from the same time last year. The unshipped balance of wheat for MY 2026/27 was 4.49 mmt, up 3 percent from last week and down 25 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26 were 0.57 mmt, down 23 percent from last week. Net [soybean export sales](#) were 0.054 mmt, up 30 percent from last week. Net [wheat export sales](#) for marketing year 2026/27 were 0.31 mmt, up 4 percent from last week.

Rail

U.S. Class I railroads originated 28,361 [grain carloads](#) during the week ending June 27. This was a 1-percent increase from the previous week, 12 percent more than last year, and 33 percent more than the 3-year average.

Average July [shuttle secondary railcar bids/offers](#) (per car) were \$88 below tariff for the week ending July 2. This was \$13 less than last week and \$156 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$38 above tariff. This was unchanged from last week and \$50 more than this week last year.

Barge

For the week ending July 4, [barged grain movements](#) totaled 554,300 tons. This was 5 percent less than the previous week and 29 percent less than the same week last year.

For the week ending July 4, 375 [barges moved down river](#), 21 fewer than the previous week. There were 616 grain barges unloaded in the New Orleans region, 7 percent more than the previous week.

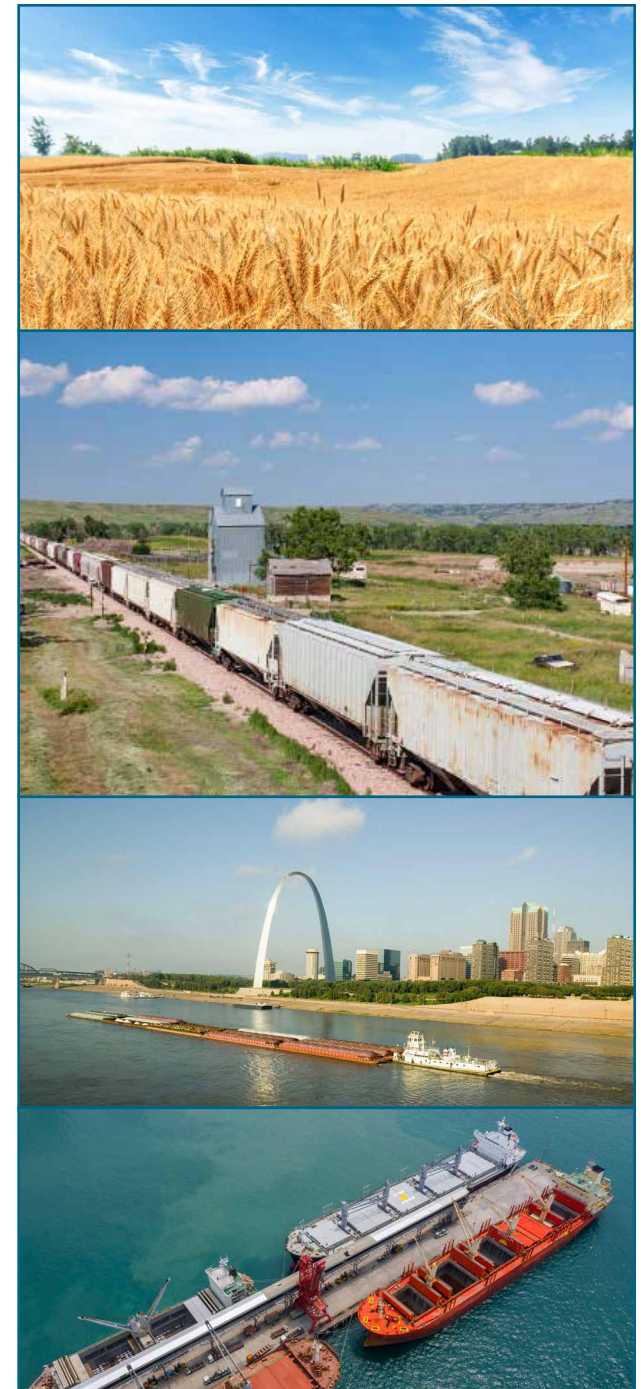
Ocean

For the week ending July 2, 32 [oceangoing grain vessels](#) were loaded in the Gulf—23 percent more than the same period last year. Within the next 10 days (starting July 3), 39 vessels were expected to be loaded—5 percent more than the same period last year.

As of July 2, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$67.50, down 3 percent from the previous week. The rate from the Pacific Northwest to Japan was \$35.75 per mt, down 1 percent from the previous week.

Fuel

For the week ending July 6, the [U.S. average diesel fuel price](#) decreased 9.0 cents from the previous week to \$4.578 per gallon, 83.9 cents above the same week last year.



June Grain Stocks, Disappearance, and Summer Transportation Outlook

Grain transportation demand is closely connected to stocks of grain held in storage. Because of this connection, tracking changes in grain stocks over time—along with complementary rail, barge, and export data—provides insight into recent past, current, and future demand for grain transportation.

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

A Look Back: March 1, 2026, to June 1, 2026

Record-High Grain Stocks Signaled Transportation Gains. Grain stocks on March 1, 2026, were 329.6 million metric tons

(mmt), 42.3 mmt (+15 percent) above average.² Most of the increase came from record corn stocks (up 27.0 mmt from average). At 192.0 mmt, grain stocks as of June 1, 2026, were also high—up 17 percent from average and the highest since 2020.

Disappearance—the difference between June 1, 2026, grain stocks and March 1, 2026, grain stocks (plus grain imports over that span)—was a record 138.7 mmt, which was 14.7 mmt (+12 percent) above average.³ Compared to respective averages, quarterly disappearance was up 9.0 mmt (+10 percent) for corn and up 4.6 mmt (+19 percent) for soybeans. Wheat disappearance was in line with prior years, up less than 1 percent from average.

Above-Expected Carloads Suggested Modal Shift Into Rail. Disappearance (or use) is an indicator for transportation, because grain consumed for export, feed, food, industrial, and other purposes uses the barge, rail, and highway networks.⁴ Assuming [historical \(2018-22\) modal shares for grain](#)—64 percent for truck, 24 percent for rail, and 13 percent for barge—the additional 14.7

mmt of above-average grain disappearance [roughly equates to](#) 413,700 truckloads; 35,300 rail carloads; and 1,200 loaded barges.

[Grain Transportation Report \(GTR\) table 3](#) and [figure 14](#) contain weekly data on two of the modes: rail and barge. Over the third quarter, carloads originated by Class I railroads—which have been strong all year ([GTR fig. 3](#))—were 71,300 cars (+23 percent) above average. This increase in railcars is double the number anticipated based on historical modal shares (in prior paragraph). All the increase occurred in the Central United States and West. Because of lower beginning (March 1) grain stocks ([GTR, April 16, 2026](#)), the Eastern railroads (CSX Transportation and Norfolk Southern Railway) originated 3,800 fewer cars (–7 percent) than average.

On the Mississippi River, 684 more grain barges than average (+9 percent) were unloaded in the New Orleans region, 43 percent fewer than the 1,200 extra barge loads anticipated.⁵ Compared to the historical-modal-share-based volumes, the barge and rail numbers suggest some modal shift into rail and away from barge

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

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

3 Mathematically, the calculation of disappearance is “March 1 stocks” plus any “grain imports in March, April, and May” minus “June 1 stocks.” In March-May 2026, the U.S. imported 1.1 mmt of grain, down 12 percent from average.

4 Disappearance (or use) is not necessarily a one-to-one measure with transportation volumes, because although a bushel can be used only once, it may be moved more than once (e.g., grain trucked or railed to a river terminal) or not at all (in the case of spoilage or on-farm use).

5 The comparisons in this paragraph reference the numbers in the first two paragraphs of this subsection: for rail, 71,300 realized vs. 35,300 anticipated, and for barge, 684 realized vs. 1,200 anticipated.

average in parens): Nebraska, up 4.8 mmt (+35 percent); Kansas, up 4.0 mmt (+41 percent); Iowa, up 3.6 mmt (+14 percent); Illinois, up 3.2 mmt (+14 percent); Minnesota, up 3.0 mmt (+17 percent); and North Dakota, up 2.7 mmt (+36 percent).

As conveyed by the percentage comparisons, stocks in the Great Plains States—Nebraska, Kansas, and North Dakota—were notably above average. Less notable, but still significant were Oklahoma, up 1.1 mmt (+67 percent), and South Dakota, up 1.9 mmt (+21 percent). All else equal, States with above-average grain stocks will likely see above-average transportation activity for the rest of the year.

In recent weeks, these higher stocks have been reflected in above-average grain carloads in States that rely heavily on rail transportation. According to the Surface Transportation Board's grain car loaded and billed data ([available on AgTransport](#)), Minnesota loaded 6,600 more cars (+34 percent) than its past-4-week average (through June 26). Also, compared to respective past-4-week averages, Nebraska is up 6,100 cars (+43 percent); North Dakota, up 5,200 cars (+31 percent); and Kansas, up 5,000 cars (+55 percent). Despite above-average June 1 grain stocks, Illinois' rail grain loadings have been low for the past 4 weeks, possibly accounted for by the strong barge shipments.

Another dynamic contributing to near-term grain transportation is new-crop grain, like wheat. [As of July 5, farmers had completed](#) 59

percent of the winter wheat harvest, 8 percentage points ahead of the 5-year average. However, wheat will have a smaller contribution to grain transportation than in past years: NASS's [June Crop Production report](#) forecasts the MY 2026/27 winter wheat crop at 27.8 mmt—which, if accurate, will be the smallest total since MY 1965/66.⁶

A Look Ahead: Harvested Acreage Changes for MY 2026/27 Corn and Soybeans

The June 1 grain stocks (and harvest progress) data are particularly relevant to the demand for grain transportation in the near term. The annual June Acreage report from NASS signals the potential demand for transportation in the next marketing year for corn and soybeans (beginning September 1).

Based on surveyed farmers' harvest intentions, NASS projects harvested corn acres to fall 3.8 million acres (−4 percent) from last year's record, but to remain 0.5 million acres above average (+1 percent). Kansas has the largest increase, with farmers planning to harvest 0.8 million more corn acres than its average (+13 percent). Also, compared to the respective averages, North Dakota is up 0.3 million acres (+8 percent) and Nebraska, up 0.2 million acres (+2 percent). Farmers intend to harvest 0.2 million fewer corn acres (each) in multiple States: Wisconsin (−7 percent); Iowa (−1 percent); Missouri (−5 percent); and Ohio (−5 percent).

Next, U.S. soybean harvested area is projected to rise 1.4 million acres above average (+2 percent), including 0.4 million more acres in Kansas (+11 percent); 0.4 million more acres in South Dakota (+7 percent); 0.3 million more acres in North Dakota (+5 percent); and 0.3 million more acres in Arkansas (+12 percent). Minnesota and Missouri show the largest drops in harvested soybean acres, down 0.2 million (−3 percent) and 0.1 million (−2 percent), respectively.

The Acreage report informs USDA's July [World Agricultural Supply and Demand Estimates \(WASDE\) report](#), to be released on July 10. The latest WASDE will translate the harvested-acreage changes into changes in overall corn and soybean supplies—which will, in turn, influence MY 2026/27 grain transportation. NASS's first State-level forecasts for MY 2026/27 corn and soybean production will not be released until next month's Crop Production report on August 12. However, the harvested acreage data still provide an early glimpse into potential spatial changes in crop volumes—namely, notable harvested-acreage increases for Kansas's corn and soybeans and the Dakotas' soybeans, as well as decreases in Missouri's harvested grain acres.

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⁶ On July 10, [NASS will publish](#) an updated forecast for winter wheat production, along with forecasts for other wheat varieties and small grains. For more on (hard red) winter wheat *rail rates* for MY2026/27, see [GTR, May 14, 2026](#).

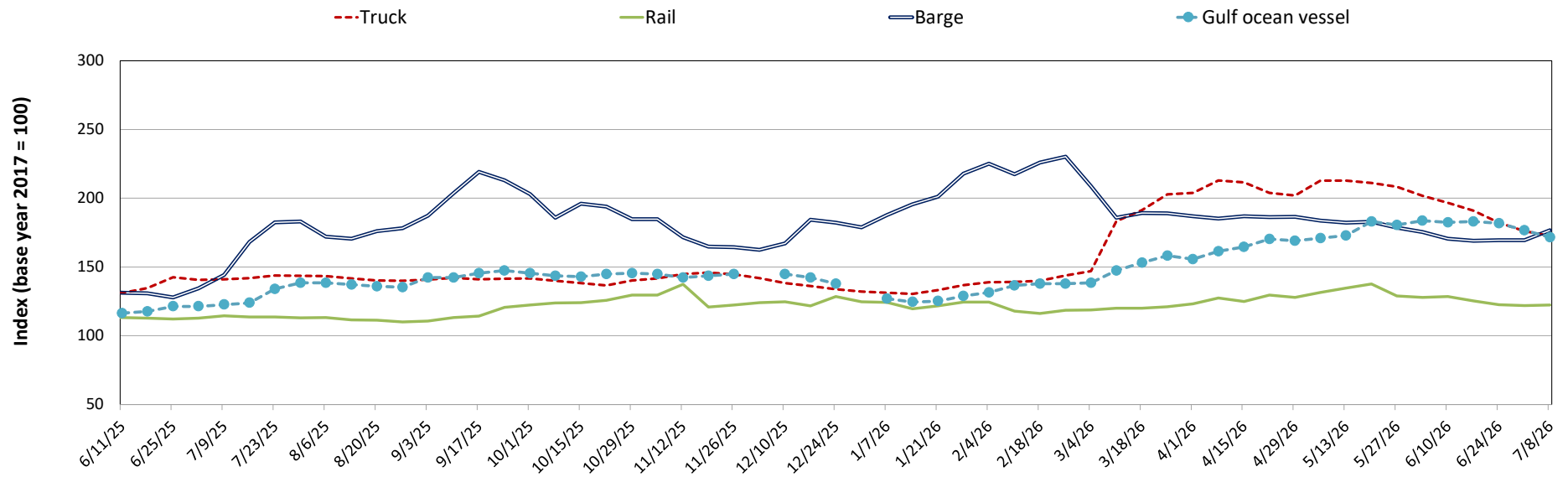
Grains are transported to the domestic and international markets via one or more of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
07/08/26	173	122	176	172	170
07/01/26	176	122	169	177	171
07/09/25	141	114	144	123	133

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.

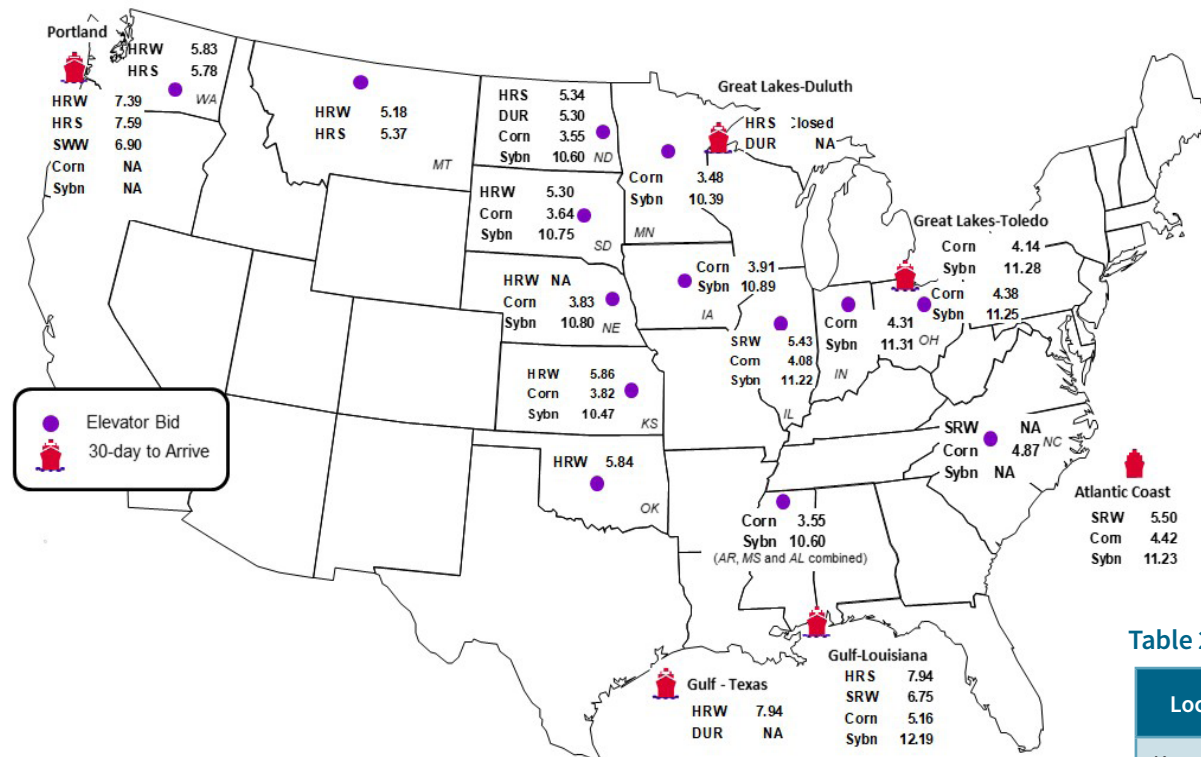
Figure 1. Grain transportation cost indicators as of week ending 07/08/26



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	7/2/2026	6/26/2026
Corn	IL-Gulf	-1.08	-0.98
Corn	NE-Gulf	-1.33	-1.19
Soybean	IA-Gulf	-1.30	-1.21
HRW	KS-Gulf	-2.08	-1.91
HRS	ND-Portland	-2.25	-2.13

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	7/2/2026	Week ago 06/26/2026	Year ago 7/3/2025
Kansas City	Wht	Sep	6.386	6.180	5.358
Minneapolis	Wht	Sep	6.188	6.053	6.473
Chicago	Wht	Sep	5.998	5.840	5.566
Chicago	Corn	Sep	4.416	4.326	4.368
Chicago	Sybn	Sep	11.478	11.450	10.490

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

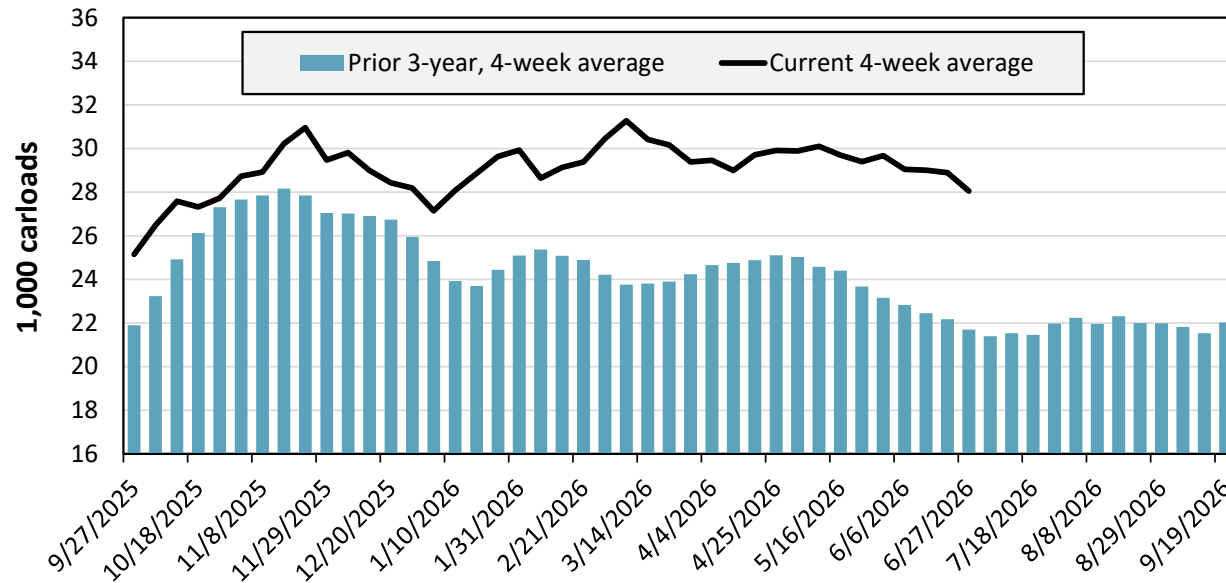
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 6/27/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,307	2,606	11,911	6,465	4,498	1,574	28,361
This week last year	1,680	2,499	11,561	5,240	3,219	1,128	25,327
2026 YTD	37,799	65,196	328,683	174,633	91,074	42,825	740,210
2025 YTD	42,267	73,491	284,080	148,872	69,809	35,854	654,373
2026 YTD as % of 2025 YTD	89	89	116	117	130	119	113
Last 4 weeks as % of 2025	102	95	113	118	122	102	112
Last 4 weeks as % of 3-yr. avg.	95	90	136	135	155	139	129
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 June 27, grain carloads were down 3 percent from the previous week, up 12 percent from last year, and up 29 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: 6/26/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	31.1	31.5	22.5	15.7	4.2	12.1	19.5
	Average over last 4 weeks	29.1	35.5	25.9	16.0	24.5	14.3	24.2
	Average of same 4 weeks last year	18.2	33.5	17.1	19.0	8.9	18.4	19.2
Average grain unit train speeds (miles per hour)	This week	21.4	16.4	22.8	22.7	22.9	20.3	21.1
	Average over last 4 weeks	20.6	17.4	22.9	22.8	23.3	19.6	21.1
	Average of same 4 weeks last year	21.9	18.5	24.8	22.5	23.8	16.8	21.4

Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City.

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

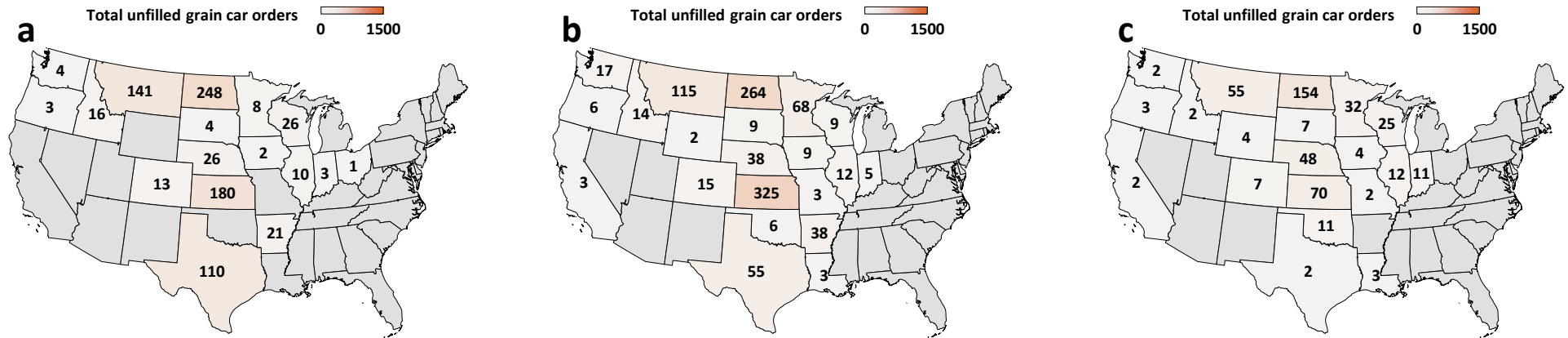
For the week ending: 6/26/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	62	19	274	46	11	153	564
	Average over last 4 weeks	49	20	286	42	16	146	557
	Average of same 4 weeks last year	25	6	238	89	8	388	754
Average number of loaded grain cars not moved in over 48 hours	This week	75	251	393	36	16	181	952
	Average over last 4 weeks	58	230	462	40	26	175	989
	Average of same 4 weeks last year	18	182	278	68	10	360	915
Average number of grain unit trains held	This week	0	0	5	5	0	2	12
	Average over last 4 weeks	0	0	4	4	0	3	12
	Average of same 4 weeks last year	0	1	3	4	0	6	14
Total unfilled manifest grain car orders	This week	5	2	432	226	0	151	816
	Average over last 4 weeks	8	4	504	410	0	88	1,013
	Average of same 4 weeks last year	12	2	254	99	0	138	504

Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City.

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](#).

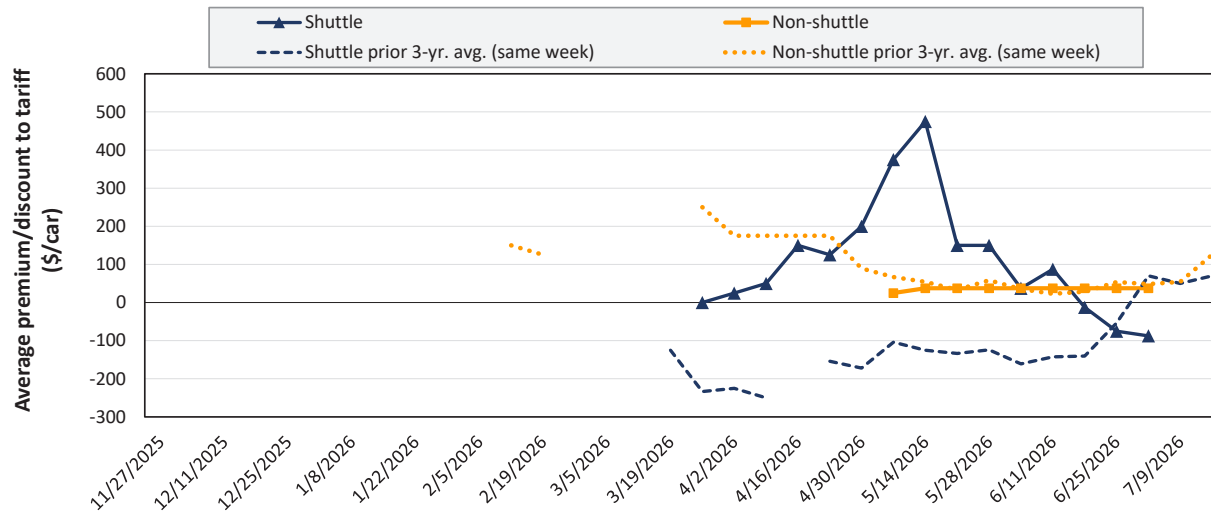
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 6/26/2026 (a); average over last 4 weeks (b); and average over same 4 weeks last year (c)



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 July 2026



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

Average shuttle bids/offers fell \$13 this week and are \$563 below the peak.

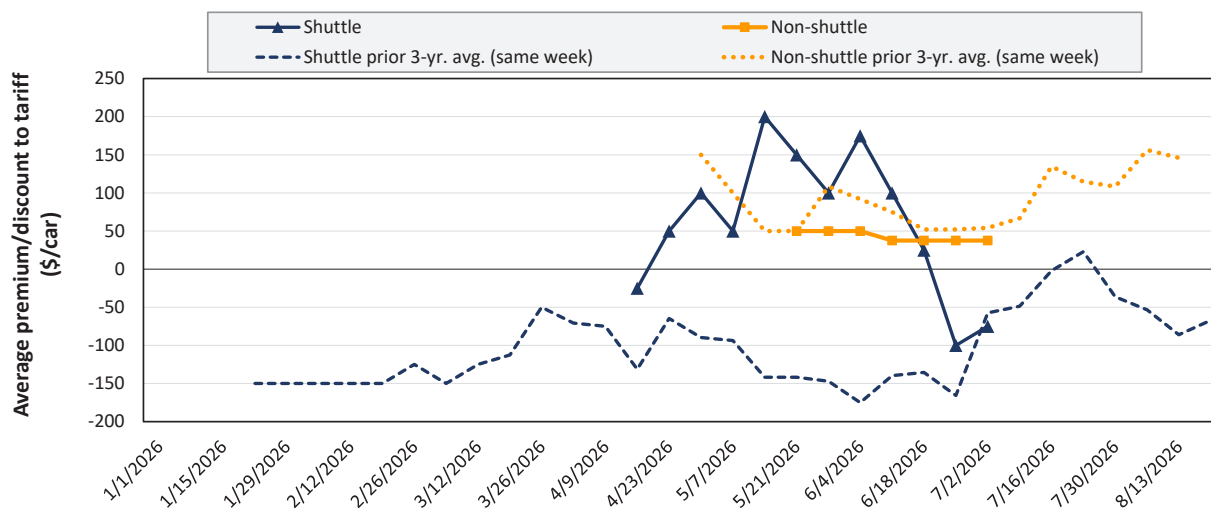
7/2/2026	BNSF	UP
Non-Shuttle	\$50	\$25
Shuttle	\$25	-\$200

Note: Shuttle bids/offers are for shuttle trains—110+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service.

n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.

Source: USDA, Agricultural Marketing Service analysis of data from the Malsam Company.

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



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

Average shuttle bids/offers rose \$25 this week and are \$275 below the peak.

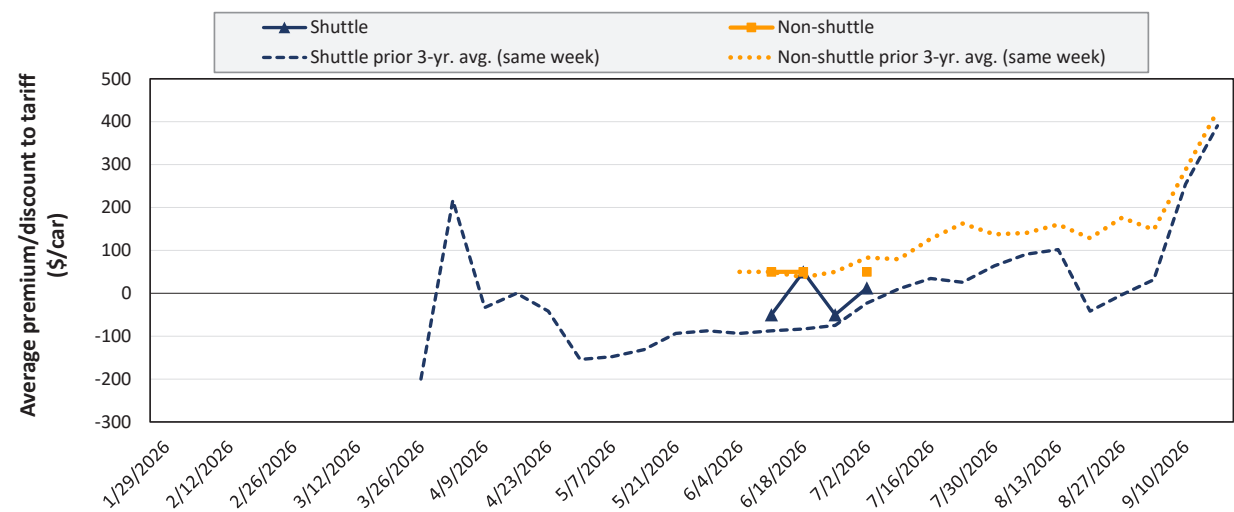
7/2/2026	BNSF	UP
Non-Shuttle	\$50	\$25
Shuttle	-\$50	-\$100

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 September 2026



There were no non-shuttle bids/offers last week. Average non-shuttle bids/offers this week are at the peak.

Average shuttle bids/offers rose \$63 this week and are \$38 below the peak.

7/2/2026	BNSF	UP
Non-Shuttle	\$50	n/a
Shuttle	\$100	-\$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.

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

For the week ending: 7/2/2026		Delivery period					
		Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26
Non-shuttle	BNSF	50	50	50	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	25	-13	-50	n/a	n/a	n/a
	UP	25	25	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	75	75	n/a	n/a	n/a	n/a
Shuttle	BNSF	25	-50	100	1,000	n/a	700
	Change from last week	75	0	100	0	n/a	n/a
	Change from same week 2025	-145	-56	138	500	n/a	n/a
	UP	-200	-100	-75	300	n/a	n/a
	Change from last week	-100	50	25	0	n/a	n/a
	Change from same week 2025	-167	100	25	0	n/a	n/a
	CPKC	-50	n/a	-100	n/a	n/a	n/a
	Change from last week	17	n/a	0	n/a	n/a	n/a
	Change from same week 2025	50	n/a	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, July 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	\$592	\$6,424	\$1.74	\$63.80	12.9
	BNSF	Williston, ND	Superior, WI	Shuttle	\$4,291	\$296	\$4,587	\$1.24	\$45.55	11.3
	CPKC	Westby, MT	St. Louis, MO	Unit	\$5,788	\$953	\$6,741	\$1.82	\$66.94	11.8
	UP	Yuma, AZ	Houston, TX	Manifest	\$6,025	\$975	\$7,000	\$1.89	\$69.51	9.2
Hard red spring (HRS)	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	\$4,804	\$343	\$5,147	\$1.39	\$51.11	10.9
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	\$6,215	\$825	\$7,040	\$1.90	\$69.91	15.6
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	\$2,865	\$159	\$3,024	\$0.82	\$30.03	12.9
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	\$5,732	\$859	\$6,591	\$1.78	\$65.45	19.6
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	\$5,838	\$727	\$6,565	\$1.77	\$65.19	15.1
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	\$5,412	\$603	\$6,015	\$1.63	\$59.73	14.3
	CPKC	Minot, ND	Kalama, WA	Unit	\$5,298	\$844	\$6,142	\$1.66	\$60.99	4.3
	CPKC	Nekoma, ND	Chicago, IL	Manifest	\$5,030	\$507	\$5,537	\$1.50	\$54.99	9.3
Hard red winter (HRW)	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	\$3,400	\$312	\$3,712	\$1.00	\$36.86	8.2
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	\$3,400	\$383	\$3,783	\$1.02	\$37.56	4.3
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	\$5,800	\$1,031	\$6,831	\$1.85	\$67.84	15.9
	BNSF	Garden City, KS	San Bernardino, CA	DET	\$5,600	\$725	\$6,325	\$1.71	\$62.81	9.6
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,200	\$528	\$4,728	\$1.28	\$46.95	11.4
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,000	\$545	\$4,545	\$1.23	\$45.14	12.6
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	\$3,500	\$449	\$3,949	\$1.07	\$39.22	11.5
	BNSF	Wichita, KS	Chicago, IL	DET	\$3,700	\$306	\$4,006	\$1.08	\$39.78	7.4
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	\$3,900	\$489	\$4,389	\$1.19	\$43.58	11.6
	UP	Byers, CO	Houston, TX	Shuttle	\$4,525	\$826	\$5,351	\$1.45	\$53.14	10.3
	UP	Goodland, KS	Kansas City, MO	Manifest	\$5,067	\$309	\$5,376	\$1.45	\$53.38	5.6
	UP	Medford, OK	Houston, TX	Shuttle	\$3,775	\$408	\$4,183	\$1.13	\$41.53	6.3
	UP	Salina, KS	Houston, TX	Shuttle	\$4,025	\$543	\$4,568	\$1.23	\$45.36	7.8
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	\$4,791	\$371	\$5,162	\$1.40	\$51.26	11.5
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	\$4,439	\$468	\$4,907	\$1.33	\$48.73	14.7
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	\$2,032	\$230	\$2,262	\$0.61	\$22.47	10.4
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	\$8,611	\$381	\$8,992	\$2.43	\$89.30	7.7
	CSX	Chicago, IL	Albany, NY	Unit	\$7,676	\$381	\$8,057	\$2.18	\$80.01	8.7
	CSX	Chicago, IL	Buffalo, NY	Manifest	\$6,102	\$243	\$6,345	\$1.71	\$63.01	7.1
	CSX	Chicago, IL	Indiantown, FL	Manifest	\$8,832	\$650	\$9,482	\$2.56	\$94.16	10.7

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, July 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	\$534	\$6,134	\$1.55	\$60.92	4.8
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	\$5,470	\$919	\$6,389	\$1.61	\$63.44	15.0
	BNSF	Edison, NE	Hanford, CA	Railroad	\$5,460	\$885	\$6,345	\$1.60	\$63.01	4.2
	BNSF	Edison, NE	Hereford, TX	Railroad	\$4,500	\$377	\$4,877	\$1.23	\$48.43	-3.9
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	\$5,350	\$1,015	\$6,365	\$1.61	\$63.20	17.0
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	\$4,620	\$452	\$5,072	\$1.28	\$50.36	10.1
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	\$4,260	\$369	\$4,629	\$1.17	\$45.96	-4.3
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	\$4,000	\$567	\$4,567	\$1.15	\$45.36	-0.4
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	\$5,430	\$799	\$6,229	\$1.57	\$61.86	13.2
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	\$5,430	\$906	\$6,336	\$1.60	\$62.92	14.9
	CN	Gibson City, IL	Reserve, LA	Private	\$2,136	\$752	\$2,888	\$0.73	\$28.68	22.8
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,516	\$752	\$3,268	\$0.82	\$32.45	19.6
	CPKC	Delhi, LA	Morton, MS	Railroad	\$1,342	\$104	\$1,446	\$0.36	\$14.35	4.5
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,047	\$970	\$6,017	\$1.52	\$59.75	9.5
	CPKC	Glenwood, MN	Boardman, OR	Railroad	\$5,513	\$934	\$6,447	\$1.63	\$64.02	8.4
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	\$6,241	\$333	\$6,574	\$1.66	\$65.28	10.3
	CSX	Marysville, OH	Rose Hill, NC	Railroad	\$6,378	\$367	\$6,745	\$1.70	\$66.98	9.9
	CSX	Olney, IL	Fairmount, GA	Railroad	\$4,891	\$235	\$5,126	\$1.29	\$50.90	8.9
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	\$3,935	\$491	\$4,426	\$1.12	\$43.95	3.4
	UP	Frankfort, KS	Calipatria, CA	Railroad	\$5,855	\$1,116	\$6,971	\$1.76	\$69.23	8.2
Soybeans	UP	Mead, NE	Keyes, CA	Railroad	\$6,015	\$1,233	\$7,248	\$1.83	\$71.98	9.0
	UP	Nebraska City, NE	Amarillo, TX	Railroad	\$4,855	\$507	\$5,362	\$1.35	\$53.25	3.0
	UP	Sloan, IA	Burley, ID	Railroad	\$5,535	\$835	\$6,370	\$1.61	\$63.26	5.9
	UP	Sterling, IL	Nashville, AR	Railroad	\$4,075	\$513	\$4,588	\$1.16	\$45.56	3.6
	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	\$6,135	\$838	\$6,973	\$1.88	\$69.25	12.3
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	\$5,185	\$797	\$5,982	\$1.62	\$59.41	-11.6
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	\$6,085	\$812	\$6,897	\$1.86	\$68.49	12.0
	BNSF	Casselton, ND	St. Louis, MO	Railroad	\$3,400	\$426	\$3,826	\$1.03	\$38.00	11.1
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	\$6,185	\$1,010	\$7,195	\$1.94	\$71.45	14.8
	CN	Gibson City, IL	Reserve, LA	Private	\$2,136	\$752	\$2,888	\$0.78	\$28.68	22.8
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,516	\$752	\$3,268	\$0.88	\$32.45	19.6
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,785	\$970	\$6,755	\$1.83	\$67.08	8.4
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	\$3,526	\$733	\$4,259	\$1.15	\$42.30	10.1
	CSX	Casey, IL	Mobile, AL	Private	\$3,646	\$366	\$4,012	\$1.08	\$39.84	10.0
	CSX	Marion, OH	Chesapeake, VA	Private	\$3,214	\$357	\$3,571	\$0.97	\$35.46	11.1
	UP	Canton, KS	Houston, TX	Railroad	\$3,650	\$530	\$4,180	\$1.13	\$41.51	-22.0
	UP	Cozad, NE	Kalama, WA	Railroad	\$5,140	\$1,109	\$6,249	\$1.69	\$62.06	-5.0
	UP	Cozad, NE	Houston, TX	Railroad	\$4,010	\$765	\$4,775	\$1.29	\$47.42	-17.8
	UP	Sloan, IA	Ama, LA	Railroad	\$4,090	\$874	\$4,964	\$1.34	\$49.30	-16.4

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.

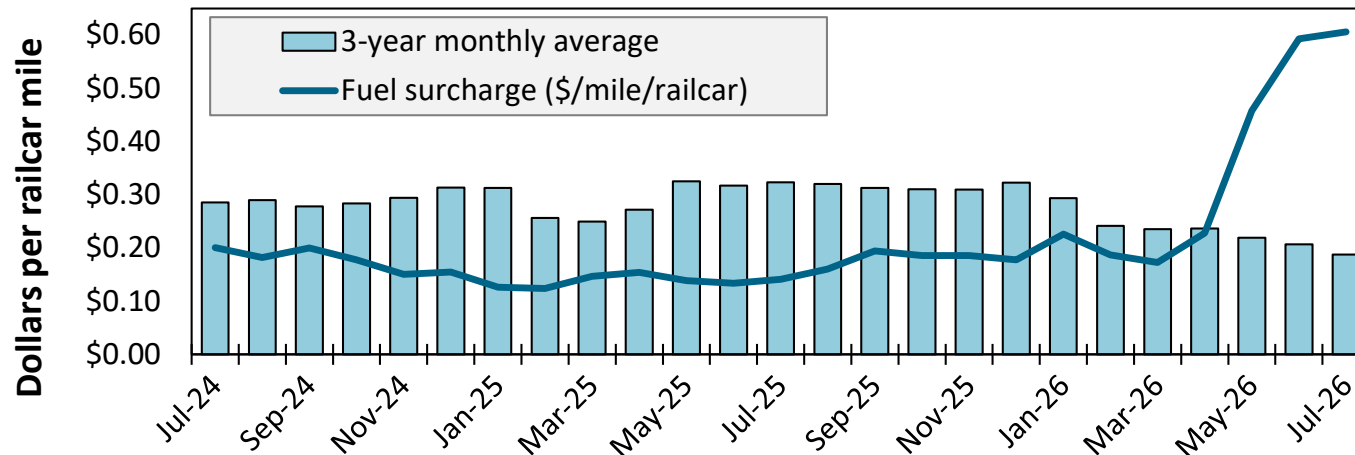
Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, July 2026

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	\$615	\$5,256	\$1.31	\$51.73	13.7
	BNSF	Superior, NE	El Paso, TX	Shuttle	\$4,622	\$484	\$5,106	\$1.28	\$50.25	1.1
	CPKC	Atchison, KS	Laredo, TX	Non-shuttle	\$5,080	\$1,118	\$6,198	\$1.55	\$61.00	12.3
	CPKC	Council Bluffs, IA	Laredo, TX	Non-shuttle	\$5,550	\$1,237	\$6,787	\$1.70	\$66.80	12.5
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$1,067	\$6,072	\$1.52	\$59.76	12.0
	CPKC	Marshall, MO	Laredo, TX	Non-shuttle	\$5,190	\$1,133	\$6,323	\$1.58	\$62.23	12.2
	UP	Pontiac, IL	Eagle Pass, TX	Shuttle	\$4,535	\$907	\$5,442	\$1.36	\$53.56	7.9
Soybeans	UP	Sterling, IL	Eagle Pass, TX	Shuttle	\$4,655	\$941	\$5,596	\$1.40	\$55.08	8.1
	BNSF	Brunswick, MO	El Paso, TX	Shuttle	\$4,325	\$523	\$4,848	\$1.30	\$47.71	-9.9
	BNSF	Hardin, MO	Eagle Pass, TX	Shuttle	\$4,325	\$520	\$4,845	\$1.30	\$47.68	-9.9
	CPKC	Atchison, KS	Laredo, TX	Non-shuttle	\$5,080	\$1,118	\$6,198	\$1.66	\$61.00	12.3
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$1,067	\$6,072	\$1.63	\$59.76	12.0
	UP	Grand Island, NE	Eagle Pass, TX	Shuttle	\$4,950	\$863	\$5,813	\$1.56	\$57.21	-11.8
Wheat	UP	Roelyn, IA	Eagle Pass, TX	Shuttle	\$5,035	\$904	\$5,939	\$1.59	\$58.45	-11.2
	BNSF	FT Worth, TX	El Paso, TX	DET	\$3,100	\$377	\$3,477	\$0.93	\$34.22	14.4
	BNSF	FT Worth, TX	El Paso, TX	Shuttle	\$2,600	\$377	\$2,977	\$0.80	\$29.30	4.9
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$1,067	\$6,072	\$1.63	\$59.76	12.0
	UP	Great Bend, KS	Laredo, TX	Shuttle	\$4,325	\$648	\$4,973	\$1.33	\$48.94	8.6
	UP	Wichita, KS	Laredo, TX	Shuttle	\$4,065	\$570	\$4,635	\$1.24	\$45.62	8.0

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

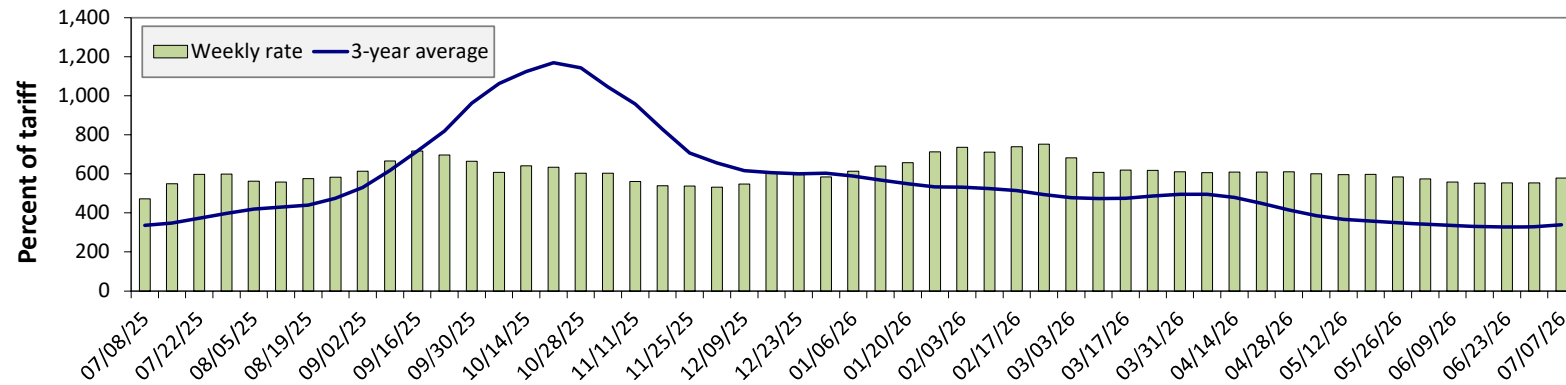


July 2026: \$0.61/mile, up 2 cents from last month's surcharge of \$0.59/mile; up 47 cents from the July 2025 surcharge of \$0.14/mile; and up 42 cents from the July prior 3-year average of \$0.19/mile.

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 July 7: 4 percent higher than the previous week; 22 percent higher than last year; and 70 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	7/7/2026	686	591	575	388	393	379
	6/30/2026	678	573	554	375	376	366
\$/ton	7/7/2026	42.46	31.44	26.68	15.48	18.43	11.90
	6/30/2026	41.97	30.48	25.71	14.96	17.63	11.49
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	17	16	22	17	21	31
	3-year avg.	58	59	70	49	46	58
Rate	August	704	670	641	566	557	560
	October	871	864	839	784	824	746

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](#).

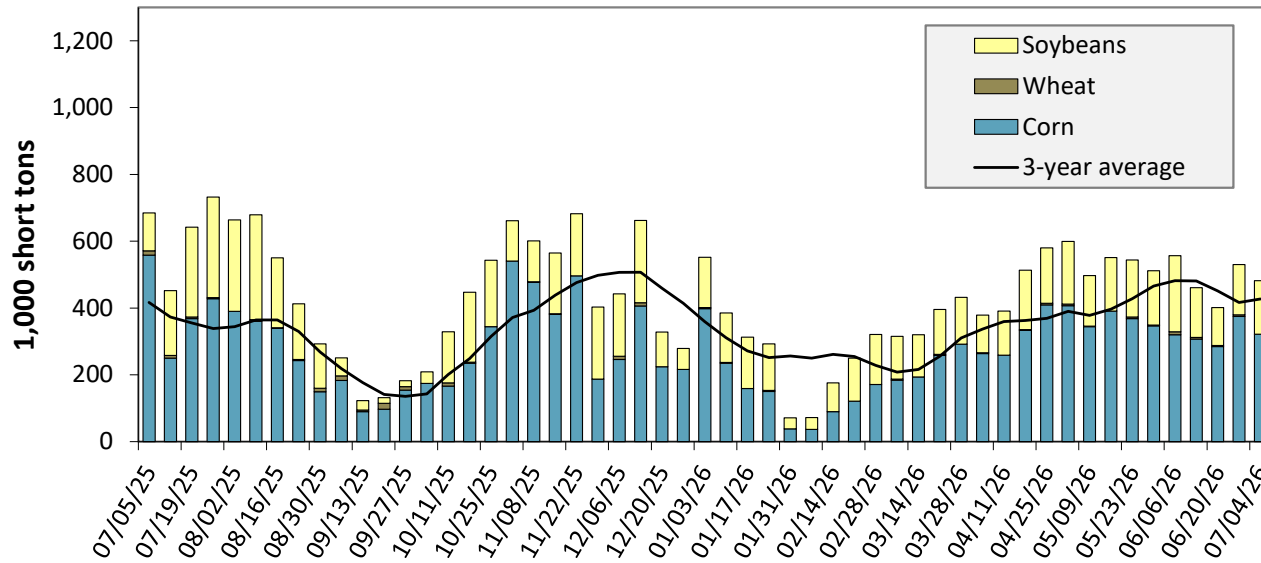
Source: USDA, Agricultural Marketing Service.

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 July 4: 30 percent lower than last year and 13 percent higher than the 3-year average.

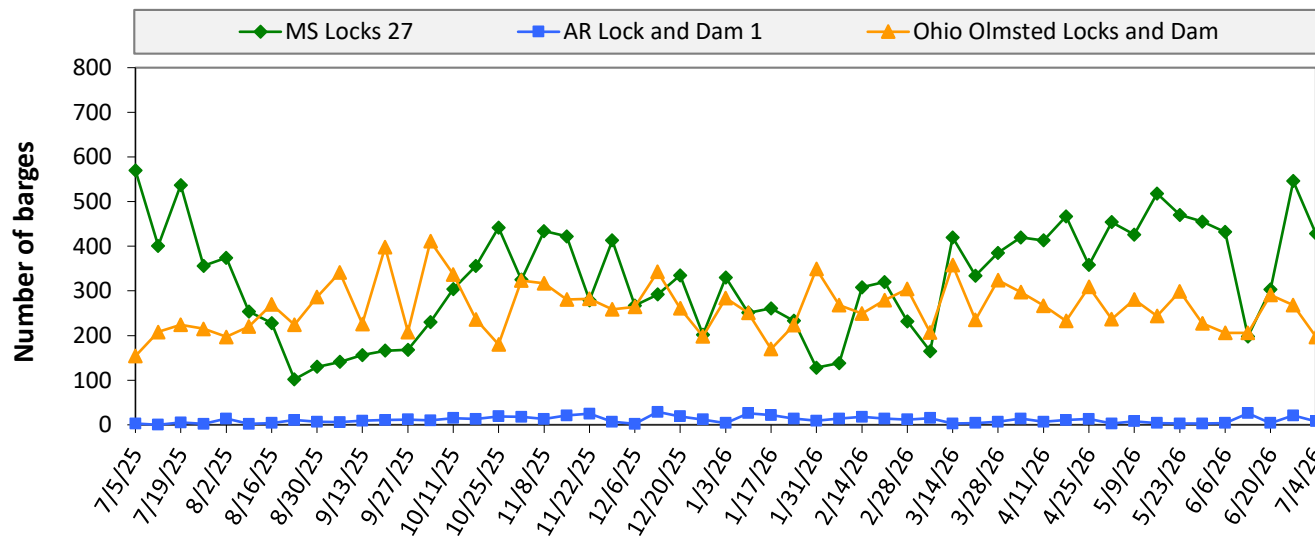
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 07/04/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	147	0	82	0	229
Mississippi River (Winfield, MO (L25))	281	0	128	0	408
Mississippi River (Alton, IL (L26))	339	0	158	0	497
Mississippi River (Granite City, IL (L27))	322	0	160	0	482
Illinois River (La Grange)	109	0	29	0	138
Ohio River (Olmsted)	37	16	11	0	64
Arkansas River (L1)	0	8	0	0	8
Weekly total - 2026	359	24	171	0	554
Weekly total - 2025	595	51	135	0	781
2026 YTD	8,690	487	5,377	45	14,598
2025 YTD	11,054	579	5,360	108	17,101
2026 as % of 2025 YTD	79	84	100	42	85
Last 4 weeks as % of 2025	71	87	94	0	77
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.

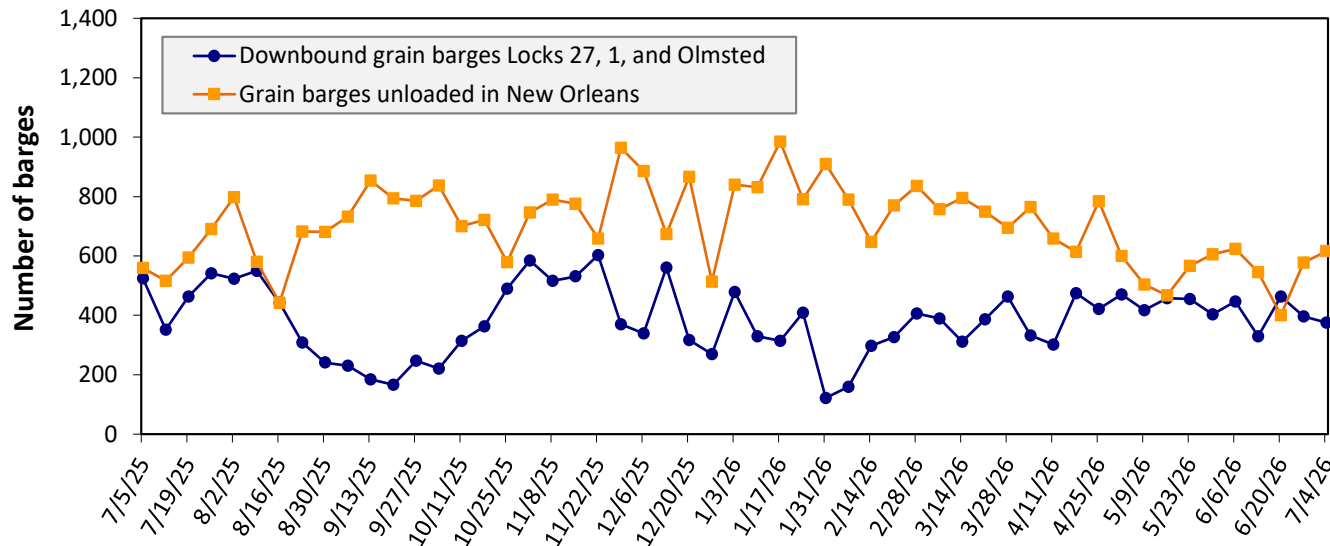
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending July 4: 633 barges transited the locks, 202 barges fewer than the previous week, and 5 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 July 4: 375 barges moved down river, 21 fewer than the previous week; 616 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	
		July 2026	June 2026	July 2025	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$24.96	\$25.42	\$21.92	13.9	18.9
	Central Ferry, WA/Almota, WA	\$24.03	\$24.49	\$21.02	14.4	19.4
	Lyons Ferry, WA	\$22.98	\$23.44	\$20.01	14.9	19.9
	Windust, WA/Lower Monumental, WA	\$21.91	\$22.37	\$18.98	15.5	20.5
	Sheffler, WA	\$21.88	\$22.34	\$18.95	15.5	20.6
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$20.64	\$21.10	\$17.75	16.3	21.4
	Port Kelly, WA/Wallula, WA	\$20.41	\$20.87	\$17.53	16.5	21.5
	Umatilla, OR	\$20.31	\$20.77	\$17.43	16.6	21.6
	Boardman, OR/Hogue Warner, OR	\$20.04	\$20.50	\$17.17	16.8	21.8
	Arlington, OR/Roosevelt, WA	\$19.88	\$20.34	\$17.01	16.9	22.0
	Biggs, OR	\$18.50	\$18.96	\$15.68	18.0	23.1
	The Dalles, OR	\$17.36	\$17.82	\$14.58	19.1	24.2

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

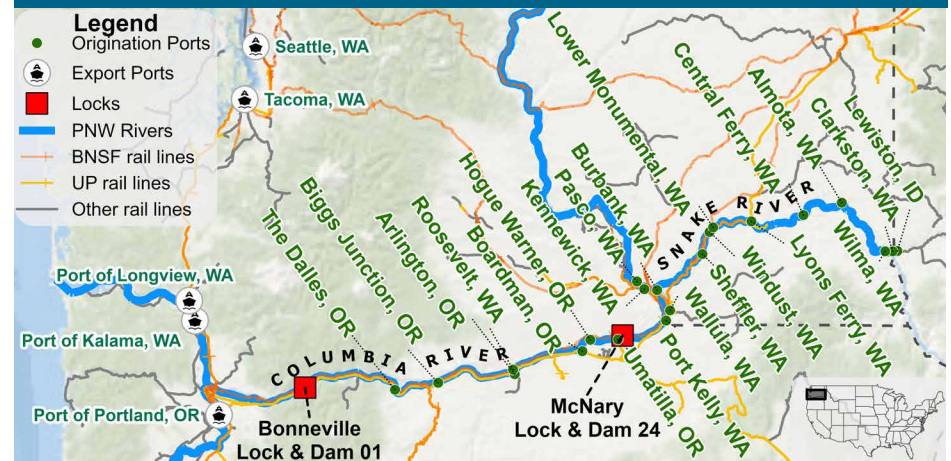
Table 12. Monthly barged grain movements, Columbia-Snake (1,000 tons)

June, 2026	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	88	0	88
Columbia River (Bonneville Lock and Dam (L1))	147	0	147
Monthly total 2026	147	0	147
Monthly total 2025	200	0	200
2026 YTD	1,544	0	1,544
2025 YTD	1,929	0	1,929

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.

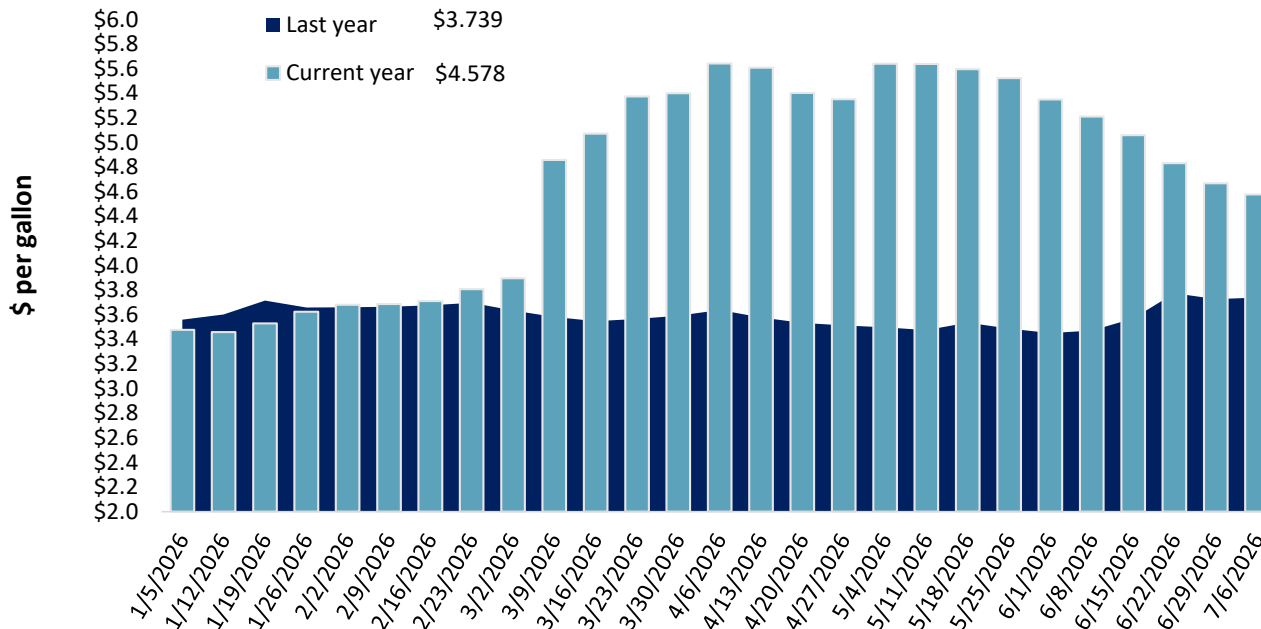
Table 13. Retail on-highway diesel prices, week ending 7/06/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.694	-0.064	0.929
	New England	5.220	-0.028	1.253
	Central Atlantic	5.146	-0.044	1.210
	Lower Atlantic	4.477	-0.070	0.797
II	Midwest	4.458	-0.125	0.725
III	Gulf Coast	4.225	-0.058	0.842
IV	Rocky Mountain	4.484	-0.118	0.818
V	West Coast	5.425	-0.103	0.963
	West Coast less California	4.864	-0.098	0.776
	California	6.073	-0.107	1.181
Total	United States	4.578	-0.090	0.839

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 July 06, the U.S. average diesel fuel price decreased 9.0 cents from the previous week to \$4.578 per gallon, 83.9 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 07/2/2026	967	674	1,333	1,350	165	4,490	14,495	3,407	22,392
	This week year ago	2,150	1,082	1,756	916	106	6,010	11,466	4,182	21,658
	Last 4 wks. as % of same period in prior marketing year	45	63	74	141	134	74	141	94	113
Current shipped (cumulative) exports sales	Current MYTD	557	221	453	362	27	1,621	71,470	37,728	110,819
	Prior MYTD	769	202	502	241	22	1,736	57,903	46,194	105,833
	Current MYTD as % of prior MYTD	72	110	90	151	121	93	123	82	105
	Total 2025/26	8,243	3,191	6,078	5,207	622	23,408	-	-	23,408
	Total 2024/25	5,377	3,095	6,560	5,730	335	21,097	69,081	50,106	140,284
	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 7/2/2026	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	2,857	24,543	22,572	9	19,839
Japan	1402	15,564	12,802	22	10,478
Colombia	272	8,304	7,328	13	5,493
China	0	0	33	-100	3,461
Korea	746	8,621	6,069	42	3,127
Top 5 importers	5,277	57,032	48,803	17	42,399
Total U.S. corn export sales	6,548	85,965	69,369	24	54,276
% of YTD current month's export projection	8%	102%	96%	-	-
Change from prior week	402	566	1,262	-	-
Top 5 importers' share of U.S. corn export sales	81%	66%	70%	-	78%
USDA forecast June 2026	80,014	84,459	72,597	16	-
Corn use for ethanol USDA forecast June 2026	142,240	141,605	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 7/2/2026	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	200	12,228	22,479	-46	26,078
Mexico	534	4,973	5,073	-2	4,762
Japan	74	2,223	2,039	9	2,107
Egypt	60	4,896	3,374	45	2,098
Indonesia	42	2,319	1,932	20	1,997
Top 5 importers	911	26,639	34,897	-24	37,042
Total U.S. soybean export sales	2,829	41,136	50,376	-18	48,941
% of YTD current month's export projection	6%	100%	98%	-	-
Change from prior week	0	54	503	-	-
Top 5 importers' share of U.S. soybean export sales	32%	65%	69%	-	76%
USDA forecast, June 2026	44,361	41,095	51,220	-20	-

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 7/2/2026	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	1,318	1,360	-3	3,720
Philippines	799	812	-2	2,677
Japan	830	676	23	2,050
Korea	724	454	60	1,881
Taiwan	275	303	-9	1,005
Nigeria	195	279	-30	878
China	NA	0	NA	863
Indonesia	67	251	-73	746
Thailand	175	233	-25	690
Vietnam	10	153	-93	581
Top 10 importers	4,393	4,520	-3	15,091
Total U.S. wheat export sales	6,110	7,746	-21	20,967
% of YTD current month's export projection	29%	31%	-	-
Change from prior week	313	568	-	-
Top 10 importers' share of U.S. wheat export sales	72%	58%	-	72%
USDA forecast, June 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)

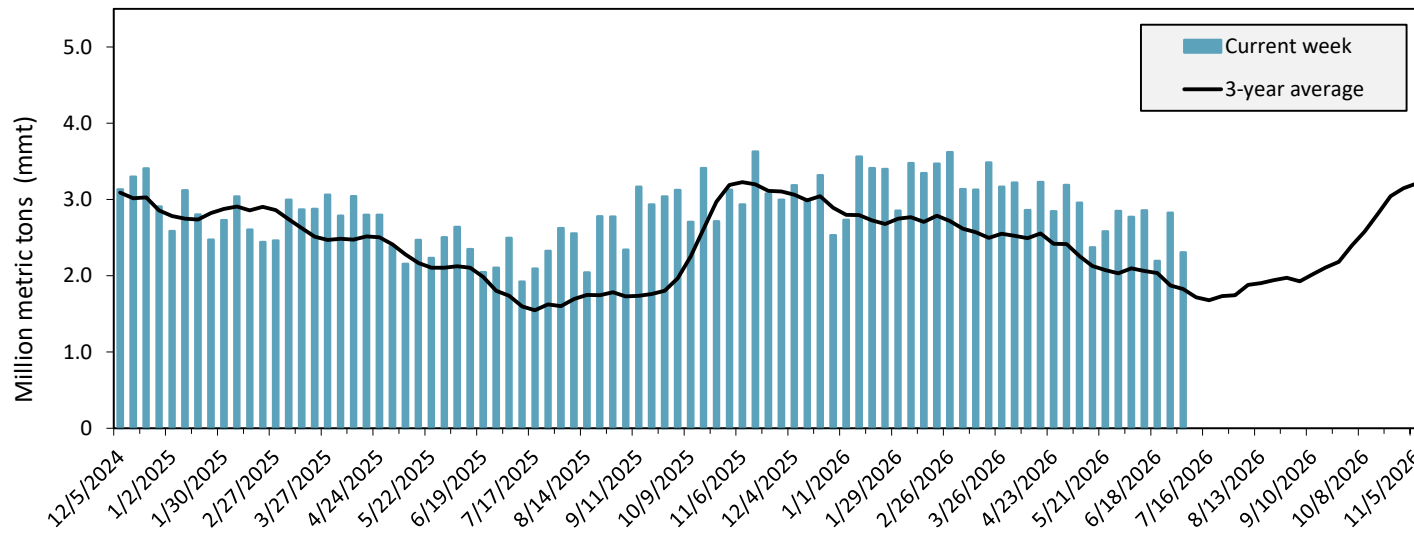
Port regions	Commodity	For the week ending 07/02/2026	Previous week	Current week as % of previous	2026 YTD	2025 YTD	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	519	682	76	13,830	13,174	105	120	185	24,214
	Soybeans	66	0	n/a	4,162	1,966	212	n/a	n/a	2,957
	Wheat	0	204	0	5,083	5,563	91	105	91	12,271
	All grain	585	886	66	23,370	20,808	112	126	162	39,721
Mississippi Gulf	Corn	699	771	91	19,637	19,738	99	87	116	37,115
	Soybeans	334	202	165	12,265	10,599	116	152	153	23,350
	Wheat	82	73	113	1,604	1,775	90	92	109	3,980
	All grain	1,116	1,046	107	33,506	32,111	104	97	122	64,484
Texas Gulf	Corn	60	33	180	846	158	534	373	435	590
	Soybeans	0	0	n/a	100	106	94	n/a	0	1,431
	Wheat	11	40	27	1,809	2,057	88	25	50	4,690
	All grain	70	239	29	6,087	2,549	239	102	161	7,774
Interior	Corn	277	294	94	8,181	6,960	118	99	123	15,546
	Soybeans	128	188	68	3,792	3,473	109	112	141	7,713
	Wheat	38	58	66	1,537	1,510	102	91	93	3,104
	All grain	446	543	82	13,786	12,254	113	100	124	26,888
Great Lakes	Corn	21	10	219	273	21	n/a	268	804	414
	Soybeans	0	0	n/a	20	0	n/a	n/a	n/a	63
	Wheat	0	23	0	168	125	135	157	128	434
	All grain	21	33	66	460	145	317	212	272	911
Atlantic	Corn	65	28	234	945	178	532	n/a	882	607
	Soybeans	1	1	52	598	463	129	405	308	1,085
	Wheat	2	1	419	9	35	25	266	52	81
	All grain	68	29	231	1,552	676	230	761	551	1,773
All Regions	Corn	1,642	1,817	90	43,712	40,228	109	105	143	78,486
	Soybeans	528	444	119	21,448	16,711	128	152	168	36,852
	Wheat	134	398	34	10,209	11,065	92	77	87	24,560
	All grain	2,306	2,828	82	79,272	68,647	115	110	140	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.

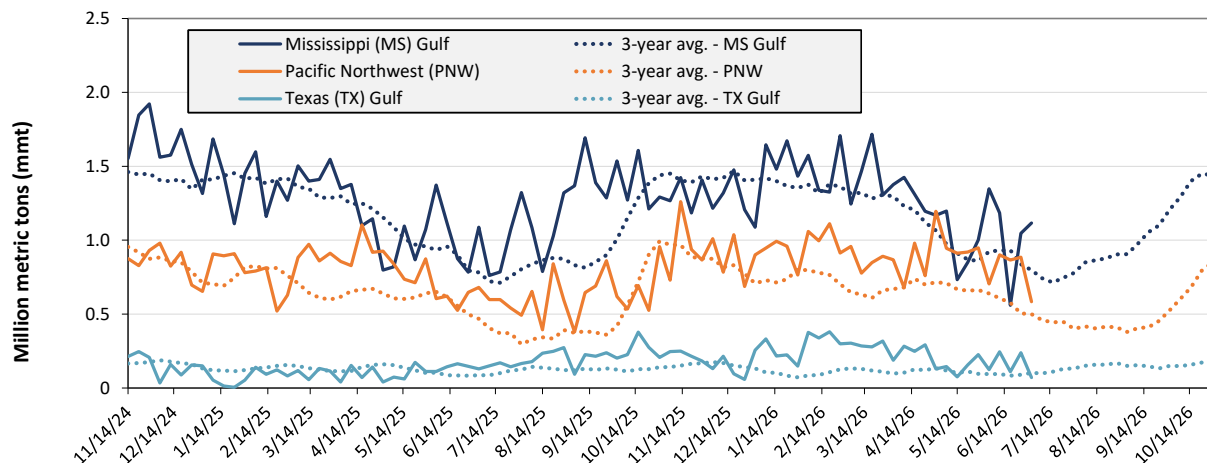
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending July 02: 2.3 mmt of grain inspected, down 18 percent from the previous week, down 13 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)



Source: USDA, Federal Grain Inspection Service.

Week ending 07/02/26 inspections (mmt):

MS Gulf: 1.12

PNW: 0.58

TX Gulf: 0.07

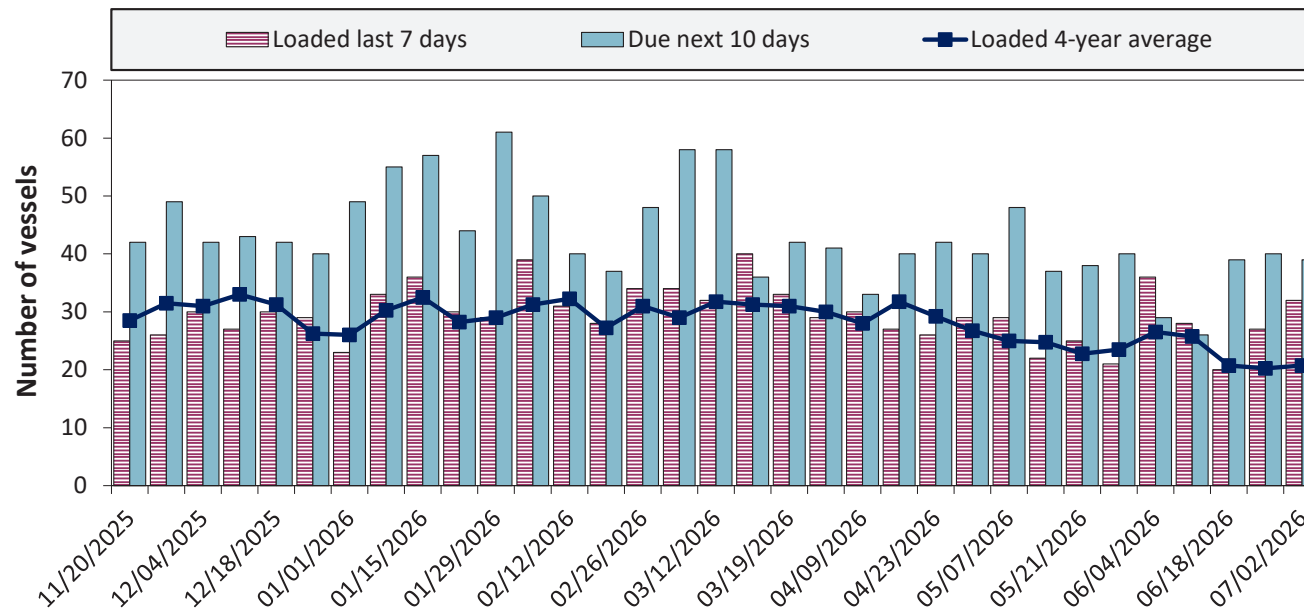
Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 7	down 71	down 8	down 34
Last year (same 7 days)	down 8	down 47	down 11	down 20
3-year average (4-week moving average)	up 40	down 32	up 32	up 17

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
7/2/2026	21	32	39	10
6/25/2026	26	27	40	7
2025 range	(12...40)	(11...37)	(26...55)	(5...25)
2025 average	28	28	45	13

Note: The data are voluntarily submitted and may not be complete.
Source: USDA, Agricultural Marketing Service.

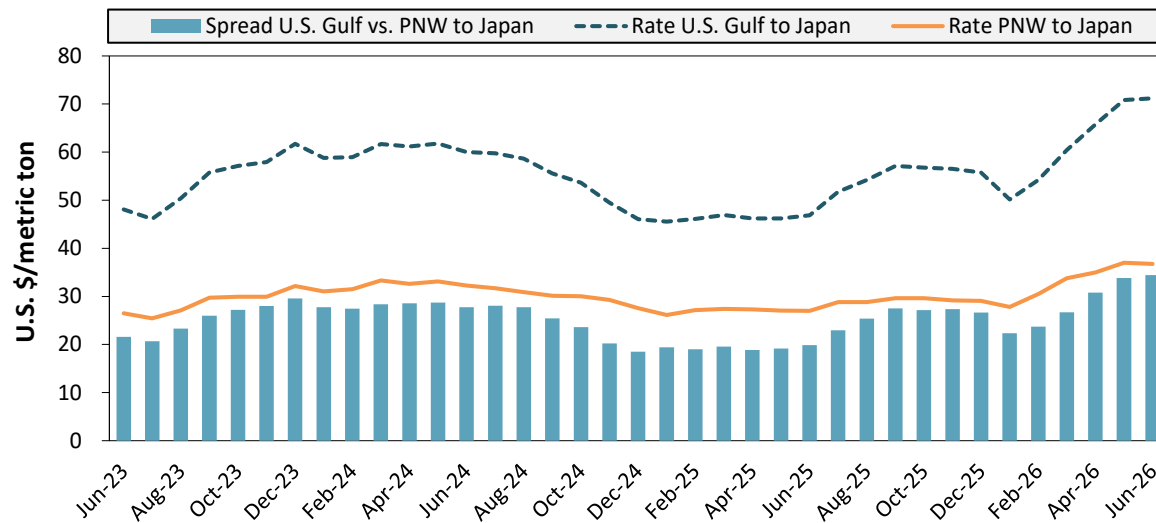
Figure 19. U.S. Gulf vessel loading activity



Week ending 07/02/26, number of vessels	Loaded	Due
Change from last year	23%	5%
Change from 4-year average	54%	14%

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
June 2026	\$71.19	\$36.75	\$34.44
Change from June 2025	52%	36%	73%
Change from 4-year average	22%	12%	34%

Table 20. Ocean freight rates for selected shipments, week ending 07/04/2026

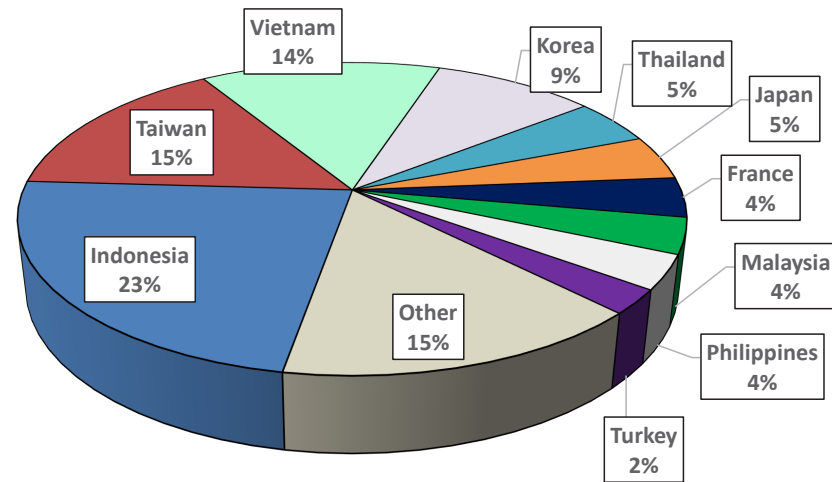
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Colombia	Soybean meal	Mar 24, 2026	May 1/10, 2026	50,000	31.60
PNW	Japan	Heavy grain	May 21, 2026	Jun 20/Jul 21, 2026	65,000	47.25
PNW	Bangladesh	Soybeans	Mar 11, 2026	May 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	Jun 5, 2026	Aug 1/15, 2026	59,000	47.95
PNW	Taiwan	Wheat	Apr 2, 2026	May 30/Jun 13, 2026	51,300	52.00
Brazil	China	Heavy grain	Jun 11, 2026	Jun 20/25, 2026	66,000	54.90
Brazil	China	Heavy grain	Jun 4, 2026	Jun 12/15, 2026	66,000	53.00
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	China	Heavy grain	May 26, 2026	Jun 13/20, 2026	66,000	54.25

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.

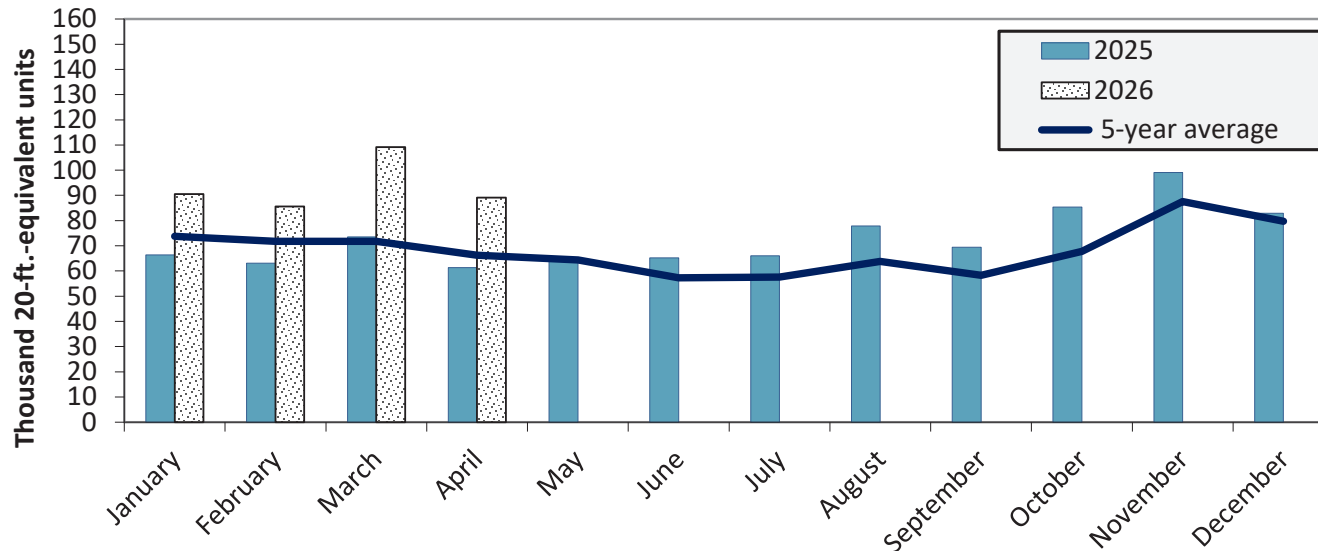
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Apr 2026



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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