



Grain Transportation Report

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www.ams.usda.gov/GTR

Diesel Price Rises 21.8 Cents After 9-Week Decline.

According to the U.S. Energy Information Administration (EIA), for the week ending July 13, the [U.S. average diesel fuel price](#) was \$4.796 per gallon—up 21.8 cents from the previous week and up 103.8 cents from the same week last year.

After 9 consecutive weeks of decline, this week's increase was the highest since the week ending May 4 when the diesel price rose 28.9 cents. The [rise in U.S. diesel prices](#) follows Russia's [ban on diesel exports](#) and reduced Russian oil refinery capacity, as well as heightened conflict in the Persian Gulf—which has limited oil shipments through the Strait of Hormuz.

Diesel prices rose in all EIA regions except New England. The Gulf region saw the highest increase—32.1 cents per gallon.

AGP Ships First-Ever Unit Train of Soybean Oil.

Ag Processing Inc. (AGP) recently [loaded and shipped](#) the first-ever U.S. unit train of soybean oil from its soybean crush plant in David City, NE. [Opened in 2025](#), the plant is capable of crushing 50 million bushels of soybeans annually, to produce nearly 700 million pounds of soybean oil. The plant has access to both BNSF Railway and Union Pacific Railroad (through the Nebraska Central Railroad).

In recent years, soybean crush capacity (to create soybean oil) has increased significantly to support the growing renewable diesel sector ([Grain Transportation Report \(GTR\), April 18, 2024](#)). The leading destination for soybean oil (by rail) is [California](#), which has five renewable diesel plants capable of producing 1.7 billion gallons of renewable diesel annually.

According to the Surface Transportation Board's [public-use carload waybill sample](#), U.S. railroads originated an estimated 7.6 million (short) tons of soybean oil in 2024—up from 5.5 million (short) tons in 2020. In 2024, 85 percent of soybean oil shipments were shipped in small lots (one to five cars).

STB Orders 30-Day Mediation Period Between Weskan and K&O.

On [April 17](#), Weskan Grain LLC (Weskan) filed a rate reasonableness complaint against Kansas and Oklahoma Railroad (K&O) at the Surface Transportation Board (STB) ([GTR, April 30, 2026](#)).

STB's mandatory [70-day pre-filing period](#) for complaints includes STB-sponsored mediation between parties. Because the rates Weskan challenged in its April 17 petition were altered from its pre-filing notice (in December 2025), the firm asked STB to waive another 70-day pre-filing period—arguing that the purpose of the pre-filing notice had already been met and another 70-day period would be “futile.”

On [May 4](#), K&O asked STB to deny Weskan's request—arguing that the complaint involves new operational requests and rates that have never been mediated. On [July 9](#), STB denied Weskan's request to waive the pre-filing notice, but shortened the mediation period to 30 days.

If Weskan files a complaint in 30 days (and STB accepts it), the case will be STB's first rate case involving grain in nearly 30 years.

Bioethanol Production Plant Doubles Capacity in Indiana.

On June 16, POET broke ground on [a \\$200 million expansion](#) of its bioethanol production plant, in Shelbyville, IN—slated for completion in fourth quarter 2027. The expansion will increase the facility's annual production capacity from 98 million gallons to 198 million gallons. The upgraded facility will also double its dried distillers' grains and corn oil output.

POET expects the expansion to create “32 million bushels of new demand for local farmers and improve access to new markets and emerging opportunities such as carbon capture, feed products, and growing demand for E15 fuel [gasoline blended with 15-percent ethanol] across the United States.”

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 9, [unshipped balances](#) of corn and soybeans totaled 16.4 million metric tons (mmt), down 9 percent from last week and up 13 percent from the same time last year. The unshipped balance of wheat for MY 2026/27 was 4.3 mmt, down 4 percent from last week and down 29 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26 were 0.32 mmt, down 44 percent from last week. Net [soybean export sales](#) were 0.19 mmt, up 246 percent from last week. Net [wheat export sales](#) for marketing year 2026/27 were 0.24 mmt, down 25 percent from last week..

Rail

U.S. Class I railroads originated 25,171 [grain carloads](#) during the week ending July 4. This was an 11-percent decrease from the previous week, 10 percent more than last year, and 24 percent more than the 3-year average.

Average July [shuttle secondary railcar bids/offers](#) (per car) were \$94 below tariff for the week ending July 9. This was \$6 less than last week and \$144 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$75 above tariff. This was \$38 more than last week and \$38 more than this week last year.

Barge

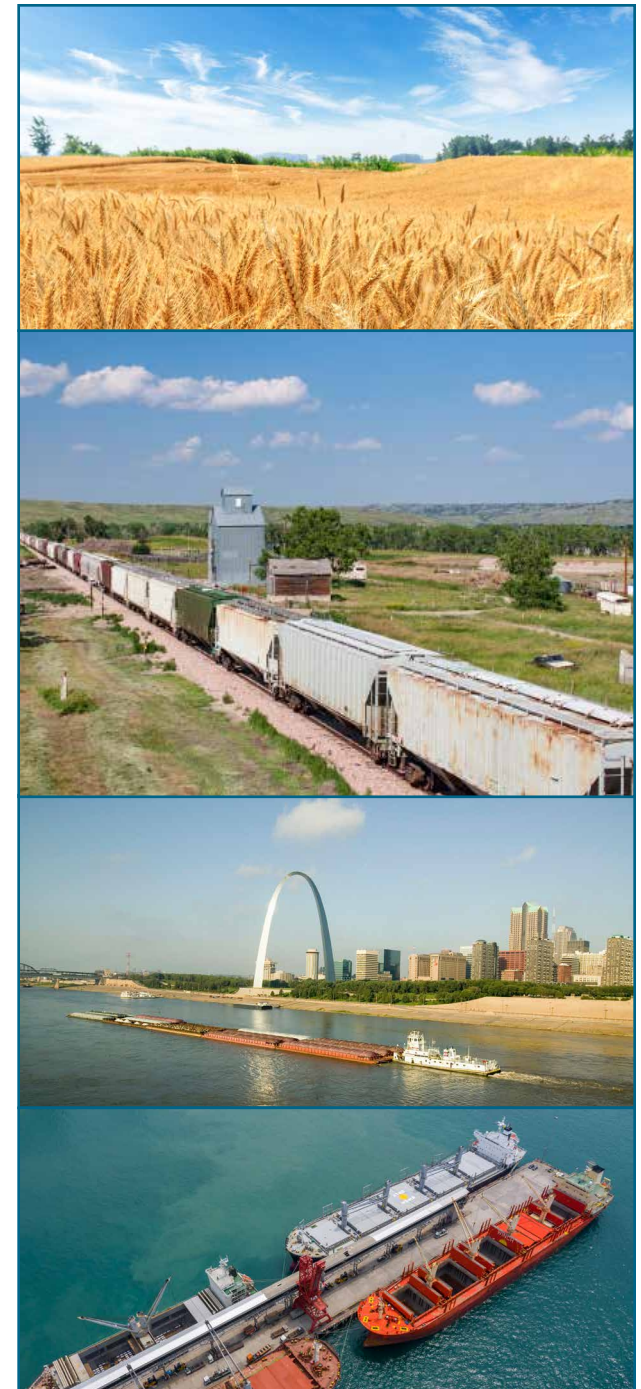
For the week ending July 11, [barged grain movements](#) totaled 669,200 tons. This was 21 percent more than the previous week and 21 percent more than the same week last year.

For the week ending July 11, 448 [barges moved down river](#), 73 more than the previous week. There were 477 grain barges unloaded in the New Orleans region, 23 percent less than the previous week.

Ocean

For the week ending July 9, 30 [oceangoing grain vessels](#) were loaded in the Gulf—30 percent more than the same period last year. Within the next 10 days (starting July 10), 37 vessels were expected to be loaded—6 percent more than the same period last year.

As of July 9, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$68.50, up 1 percent from the previous week. The rate from the Pacific Northwest to Japan was \$35.00 per mt, down 2 percent from the previous week.



Changes to Northern Wheat Rail Freight Rates in MY 2026/27

The Northern Plains (i.e., Minnesota, Montana, North Dakota, and South Dakota) and Pacific Northwest (PNW) (i.e., Idaho, Oregon, and Washington) grow a variety of wheat classes—including hard red winter (HRW), hard red spring (HRS), soft white (SW), and durum. This article begins by recapping northern wheat production and export volumes in marketing year (MY) 2025/26.¹ Next is a summary of changes to rail tariff rates in MY 2026/27—which will be incorporated into [Grain Transportation Report \(GTR\) table 6](#) next month. Using the latest USDA data, the article ends with a look at MY 2026/27 supply and demand estimates, by wheat class. In the May 14 GTR, [a companion piece to this article](#) examined changes to HRW wheat rail freight rates in the Southern Plains.

Review of MY 2025/26—Railroads Raise Rates Amid Larger Northern Wheat Crop

At 956.3 million bushels (mbu), Northern wheat production in MY 2025/26—across all classes—was 10 percent above average.² Export trends varied by wheat class: HRS and SW wheat exports were down slightly from average, while HRW wheat exports (from the PNW) and durum exports were above average. Railroads raised tariff rates in most lanes—most common was a \$200 per car increase.

Production Rose Across Classes. Compared to respective averages, MY 2025/26 HRS wheat production was up 2 percent (at 458 mbu); SW wheat production was up 11 percent (at 259 mbu); and durum wheat production was up 39 percent (at 86 mbu).³ In Montana, where both major wheat classes are grown, HRW wheat production rose while HRS wheat production fell. In MY 2025/26, Montana's winter wheat production totaled 100 mbu—up 36 percent from average and the highest since MY 2016/17, while the State's spring wheat production totaled just 57 mbu—down 23 percent from average.

HRS and SW Exports Down Slightly.

According to USDA's Federal Grain Inspection Service, HRS wheat [inspected for export](#) totaled 223.1 mbu in MY 2025/26—down 2 percent from average. By port region (and compared to respective averages), 139.9 mbu was exported from the PNW (down 13 percent); 37.1 mbu, from Texas ports (up 122 percent); 26.9 mbu, from the Interior (up 11 percent); 13.0 mbu, from the Mississippi Gulf (down 16 percent); and 6.3 mbu, from Duluth-Superior (down 34 percent).

The rise in HRS wheat exports from Texas ports and the Interior (i.e., mostly rail exports to Mexico) likely reflects CPKC's new single-line service. Formed in 2023 (through a merger of Canadian Pacific and Kansas City Southern

railways), CPKC connects HRS production areas in the Northern Plains to Texas ports and the U.S.-Mexico Border. Last July, the Surface Transportation Board ruled that CPKC could use haulage rights—originally granted to Kansas City Southern Railway—over Union Pacific Railroad (UP) tracks to access the Port of Houston, TX ([GTR, July 10, 2025, first highlight](#)). The sharp decline in HRS wheat exports from Duluth-Superior continues a decades-long trend, and last year, CHS (the port's largest grain shipper) closed its export terminal there ([GTR, July 17, 2025, first highlight](#)).

SW wheat inspected for export totaled 168.3 mbu in MY 2025/26—also down 2 percent from average. Grown in Idaho, Oregon, and Washington, nearly all SW wheat exports are exported from Columbia River ports—arriving at export terminals primarily by rail or barge ([GTR fig. 15](#)).

HRW and Durum Exports Rose. While HRW wheat grown in the Southern Plains is primarily exported from the Texas Gulf or overland to Mexico (by rail), HRW wheat grown in Montana is primarily exported from the PNW. In MY 2025/26, HRW wheat inspected for export from the PNW totaled 90.2 mbu—up 18 percent from average. Durum wheat inspected for export in MY 2025/26 totaled 23.6 mbu—up 33 percent from average.

1 Wheat's marketing year runs from June 1 to May 31.

2 In this article, "average" (as referring to a historical average) specifically denotes the "prior 5-year average."

3 In Montana and North Dakota, specifically, durum wheat production totaled 79 mbu—up 48 percent from average.

Fifty-seven percent of durum exports were from the Texas Gulf and 26 percent, from Duluth-Superior.

Railroads Raised Tariff Rates in Most Lanes.

In August 2025, BNSF Railway (BNSF) raised shuttle train tariff rates by \$200 per car from the Northern Plains to the PNW and Great Lakes, and by \$300 per car from the Northern Plains to the Texas Gulf and Mexico. BNSF's Domestic Efficiency Train (DET) and manifest rates for domestic movements (e.g., Chicago, IL, interchange) rose by \$200 per car across all Northern Plains origins.⁴ Across CPKC's Northern Plains origins, the railroad lowered its shuttle train tariff rates to the PNW by \$200 per car, while rates to Chicago rose by \$200 per car ([GTR, June 26, 2025](#)).

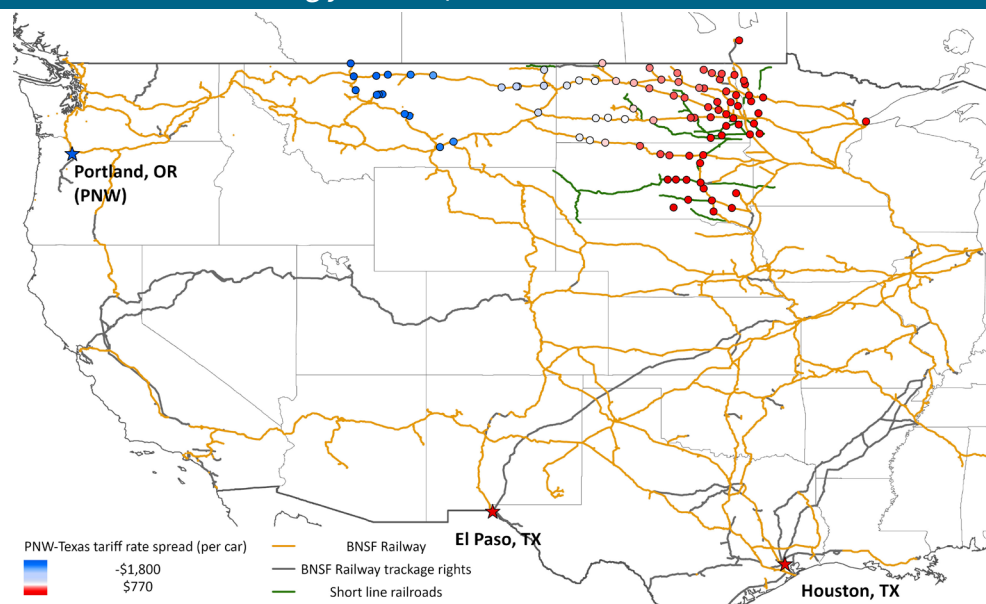
Railroads To Raise Northern Wheat Tariff Rates in MY 2026/27

Unlike last year (when BNSF made the same rate adjustments for all origins), this year's rate changes (effective in August)—to the major HRS, HRW, and durum lanes—vary by origin and destination, thereby changing the tariff rate spreads. CPKC will raise rates by \$225 per car across most of its U.S. origins.

BNSF Rate Adjustments. For shipments to PNW export terminals, BNSF will raise the shuttle tariff rate by \$150 per car for nearly all origins in Minnesota, Montana, and North

⁴ Unlike shuttle trains, which are composed of 110+ cars that move from one origin to one destination, DETs (exclusive to BNSF) are composed of 110 cars loaded at a single origin and split en route to multiple destinations.

Figure 1. BNSF Railway's wheat tariff rate spread between Pacific Northwest export terminals and Texas export locations for marketing year 2026/27



Note: The tariff rate applies to 110-120 car shuttle trains composed of large covered hopper cars.

Source: U.S. Department of Transportation, Bureau of Transportation Statistics, North American Rail Network. USDA/Agricultural Marketing Service analysis of BNSF Railway Tariff 4022; Items 43910 and 46700.

Dakota, and by \$50 per car for South Dakota origins. To the Port of Duluth-Superior, BNSF will raise tariff rates (for shuttle, DET, and manifest shipments) by \$175 per car.

For SW wheat in the PNW, BNSF will raise shuttle rates by \$50 per car. From Ritzville, WA, to Portland, OR, export terminals, the rate (tariff plus fuel surcharge) in August will be \$2,255 per car—which equates to \$20.31 per (short) ton. The base rate for barge shipments on the Columbia-Snake River is set to rise by 3.5 percent from each origin next month ([GTR table 11](#)), and the barge rate (tariff plus fuel

surcharge) from the Lower Monumental dam (about 50 miles south of Ritzville) will be \$21.60 per short ton.

Across all BNSF's Northern Plains origins, tariff rates to the U.S.-Mexico border (primarily at El Paso, TX) and the Texas Gulf (primarily Houston, TX) are the same. BNSF will raise its shuttle tariff rates to Texas by \$250 per car for origins in Montana and 19 origins in North Dakota, and 10 North Dakota origins will see a \$200 per car increase. Most BNSF origins in the Red River Valley (eastern North Dakota and western Minnesota) will see tariff rates to

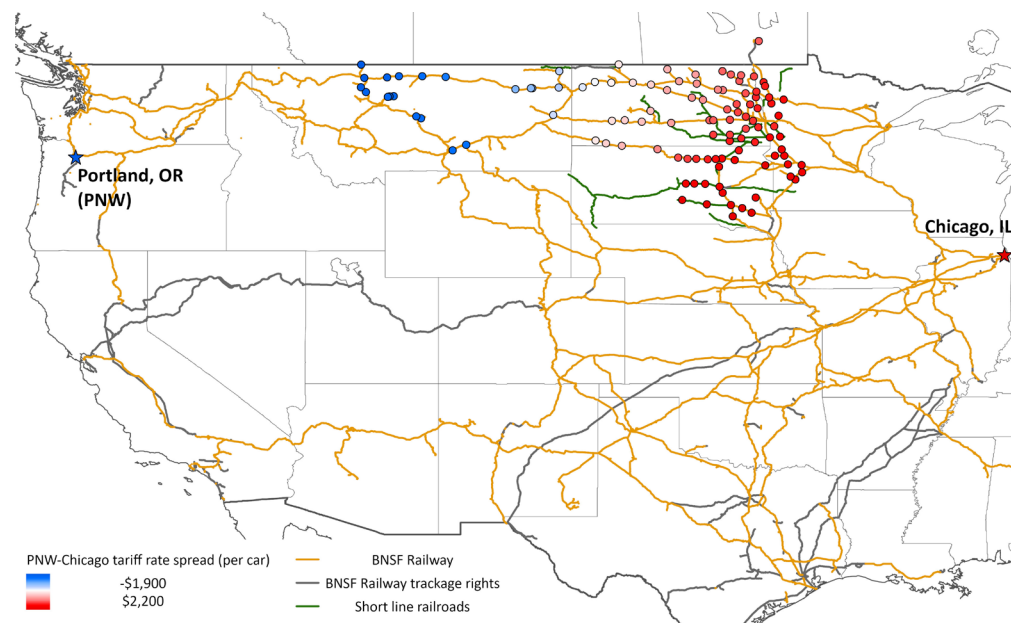
Texas export locations rise by \$150 per car. In South Dakota, origins in the north (e.g., Bowdle, SD) will see a \$50-per-car increase to Texas export locations, while origins in the south (e.g., Kennebec, SD) will see no change in rates to Texas.

BNSF wheat shipments destined for eastern interchange (in Chicago) are primarily shipped in DETs and manifest traffic, rather than shuttle trains. BNSF will raise DET rates to Chicago by about \$225 per car for 39 origins—mostly in the Red River Valley in eastern North Dakota and western Minnesota. Domestic DET rates will rise between \$150-\$200 per car for other North Dakota origins, and will rise about \$175 per car for most origins in South Dakota. Montana origins (which send the least wheat east) will see modest rate increases—averaging \$115 per car.

BNSF Rate Spreads. Lane-by-lane tariff rate adjustments have shifted BNSF's tariff rate spreads. The shuttle tariff rate spread between the PNW and the Texas Gulf/U.S.-Mexico border is shown in [figure 1](#)—for all origins with rates to both destinations. Figure 2 shows the tariff rate spread between shuttle shipments to the PNW and DET shipments to Chicago—for all origins with rates to both destinations.

Most origins in Minnesota, North Dakota, and South Dakota have a positive PNW-Texas tariff rate spread—meaning that rates to Texas are lower than rates to the PNW ([fig. 1](#)). Conversely, origins in Montana (and a few far-west North Dakota origins) have a negative

Figure 2. BNSF Railway's wheat tariff rate spread between Pacific Northwest export terminals and Chicago, IL, for marketing year 2026/27



Note: PNW tariff rates apply to shuttle trains composed of large covered hopper cars. Chicago tariff rates apply to Domestic Efficiency Trains composed of large covered hopper cars.

Source: U.S. Department of Transportation, Bureau of Transportation Statistics, North American Rail Network. USDA/Agricultural Marketing Service analysis of BNSF Railway Tariff 4022; Items 43910 and 45700.

PNW-Texas tariff rate spread—meaning that rates to the PNW are lower than rates to Texas. Compared to last year, 40 origins (in Montana and North Dakota) will see a \$100 decrease in the tariff rate spread (favoring PNW shipments). Most origins will see a change in the spread of less than \$50 per car (in either direction). Three North Dakota origins—Ross, Hebron, and New Salem—will see their PNW-Texas tariff rate spread change direction: from positive (favoring Texas) to negative (favoring the PNW).

The PNW-Chicago tariff rate spread uses the shuttle rate for the PNW and the DET rate for Chicago ([fig. 2](#)). Similar to the PNW-Texas tariff rate spread, most origins in Minnesota, North Dakota, and South Dakota have a positive PNW-Chicago tariff rate spread—meaning that DET rates to Chicago are lower than shuttle rates to the PNW. Origins in Montana favor the PNW over Chicago (as well as over Texas). Compared to last year, the biggest changes in the PNW-Chicago tariff rate spread will be in

South Dakota—where 23 origins will see a more than \$100 decrease in the PNW-Chicago tariff rate spread.

Despite this shift, these South Dakota origins still heavily favor Chicago (by about \$1,800 per car, on average). Thirty-six origins (mainly in the Red River Valley) will see a \$75 decrease in the PNW-Chicago spread. Twenty-three origins (mostly in Montana) will see a small increase (of less than \$50 per car) in the PNW-Chicago spread—though these origins still heavily favor the PNW.

CPKC Rate Adjustments. For shipments to PNW export terminals, CPKC will raise its tariff rates (for shuttle and manifest shipments) by \$225 per car for all its U.S. origins. Similarly, CPKC will raise its tariff rates (for shuttle and manifest shipments) to domestic destinations (e.g., Chicago and St. Louis, MO) by \$225 per car across U.S. origins. Because these rate increases are the same, there are no changes to CPKC's tariff rate spreads this year.

From its origins in Canada to U.S. destinations, CPKC will raise its wheat tariff rates by \$240 per car—slightly more than the increase from U.S. origins. Beginning in August, the tariff rate

for shipping a unit train of durum wheat from Assiniboia, SK, to St. Louis, MO, will be \$6,045 per car (up \$240 from last year). From Westby, MT, to St. Louis the unit train tariff rate will be \$6,013 per car (up \$225 from last year).

Unlike in the Southern Plains (where BNSF and UP both serve the major Kansas terminals), BNSF and CPKC do not serve many of the same elevators in the Northern Plains. However, because the two railroads do serve elevators that are close to each other, BNSF and CPKC compete for shipping wheat to Chicago and the PNW. Beginning in August, the 25-car CPKC rate (tariff plus fuel surcharge) from Nekoma, ND, to Chicago will be \$5,673 per car, and the BNSF DET rate (tariff plus fuel surcharge) from Langdon, ND, to Chicago will be \$5,377 per car.⁵ (Nekoma and Langdon are less than 15 miles apart.)

Looking Forward: Northern Wheat Production and Use in MY 2026/27

According to USDA's latest [Crop Production](#) report, MY 2026/27 HRS wheat production will total 436.2 mbu (up less than 1 percent from average); SW wheat production will total 253.5 mbu (up 11 percent from average); and durum

wheat production will total 70.9 mbu (up 8 percent from average). In Montana, winter wheat production is projected to total 74.8 mbu—down 4 percent from average.

The July [World Agricultural Supply and Demand Estimates](#) (WASDE) report provided USDA's first export projections for the MY 2026/27 wheat crop, by class. USDA projects that HRS wheat exports will total 240 mbu (up 5 percent from average); white wheat exports will be 200 mbu (up 9 percent from average); and durum wheat exports will be 25 mbu (up 9 percent from average).

In the July WASDE report, USDA also projects domestic food use for HRW wheat to total 370 mbu in MY 2026/27—down 5 percent from average. Domestic food use for HRS wheat is projected to total 268 mbu—up 5 percent from average. The shift from HRW to HRS is expected following a historically narrow [price spread](#) between the two classes.

Austin.Hunt@usda.gov

⁵ In order to receive the DET tariff rate, a shipper must acquire a DET contract, either through a BNSF auction or through the secondary market.

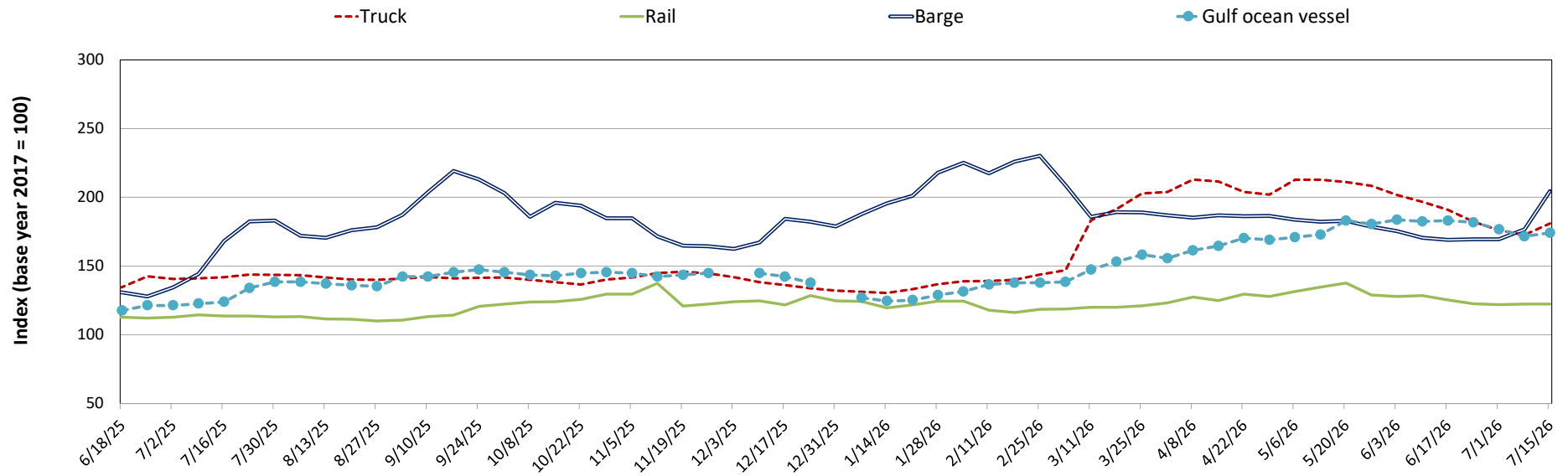
Grains are transported to the domestic and international markets via one or more of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
07/15/26	181	122	205	174	166
07/08/26	173	122	177	172	170
07/16/25	142	114	168	124	134

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.

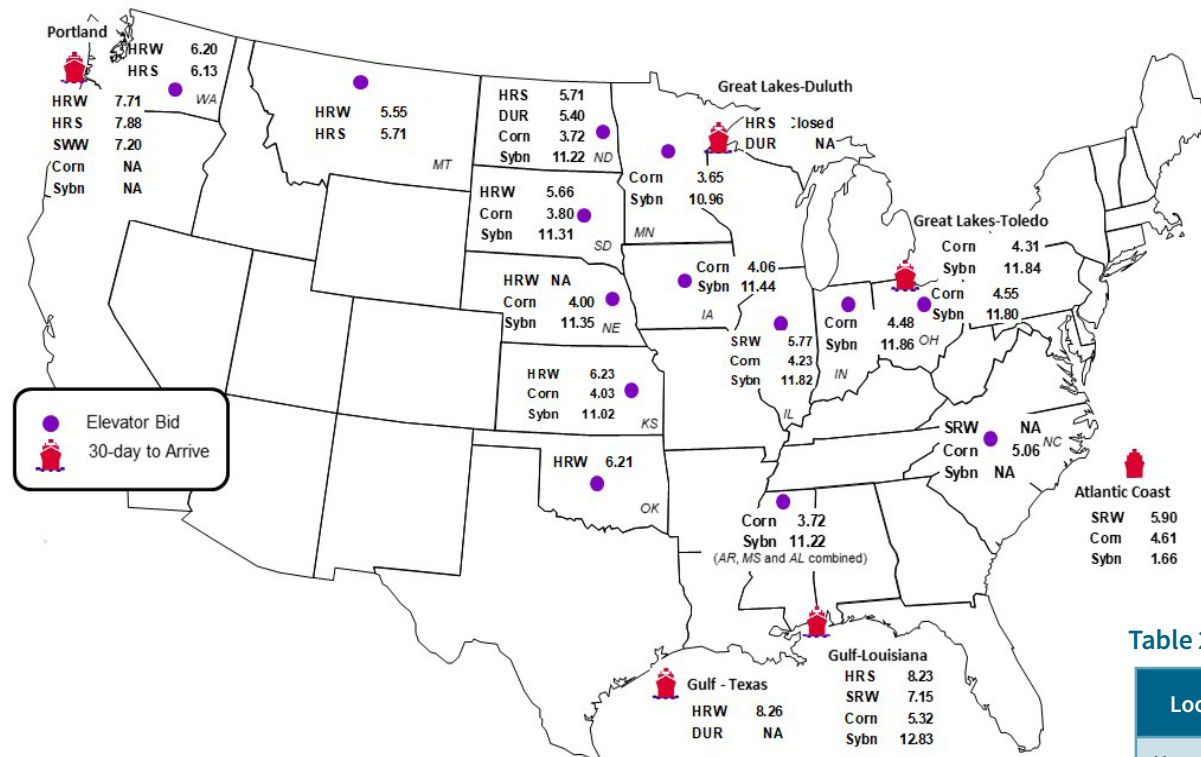
Figure 1. Grain transportation cost indicators as of week ending 07/15/26



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	7/10/2026	7/2/2026
Corn	IL-Gulf	-1.09	-1.08
Corn	NE-Gulf	-1.32	-1.33
Soybean	IA-Gulf	-1.39	-1.30
HRW	KS-Gulf	-2.03	-2.08
HRS	ND-Portland	-2.17	-2.25

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	7/10/2026	Week ago 07/02/2026	Year ago 7/11/2025
Kansas City	Wht	Sep	6.762	6.386	5.240
Minneapolis	Wht	Sep	6.525	6.188	6.138
Chicago	Wht	Sep	6.400	5.998	5.448
Chicago	Corn	Sep	4.610	4.416	4.124
Chicago	Sybn	Sep	11.908	11.478	10.072

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

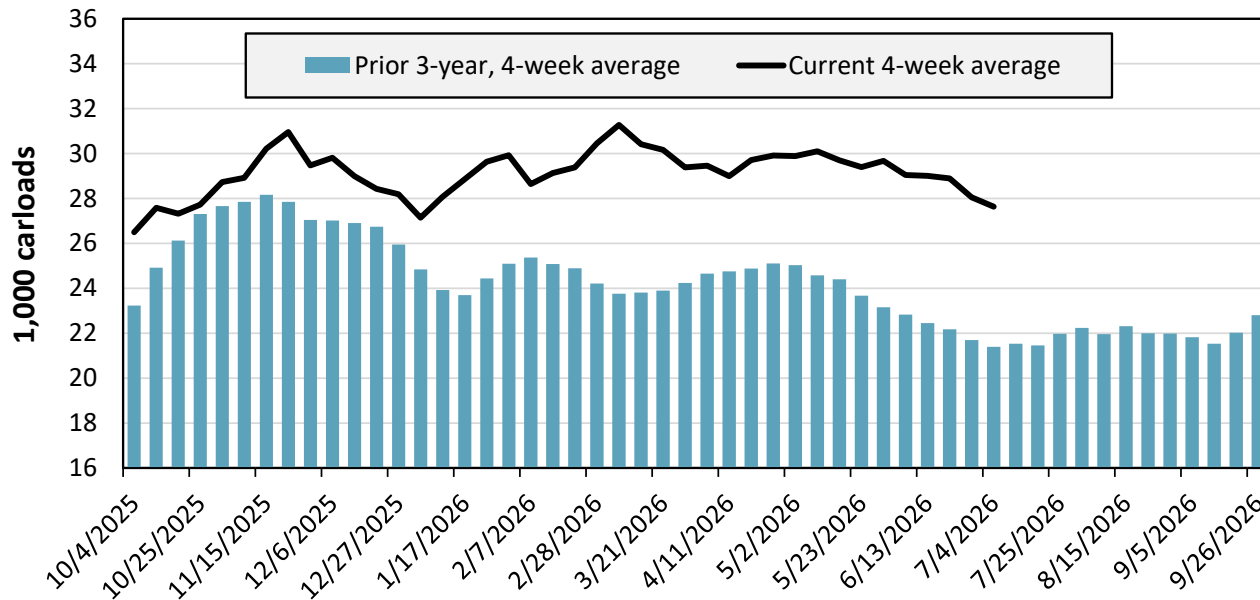
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 7/04/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,424	1,182	11,546	6,227	2,962	1,830	25,171
This week last year	1,297	2,526	9,898	5,317	2,298	1,532	22,868
2026 YTD	39,223	66,378	340,229	180,860	94,036	44,655	765,381
2025 YTD	43,564	76,017	293,978	154,189	72,107	37,386	677,241
2026 YTD as % of 2025 YTD	90	87	116	117	130	119	113
Last 4 weeks as % of 2025	107	85	113	118	122	108	112
Last 4 weeks as % of 3-yr. avg.	98	80	137	135	156	148	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 July 4, grain carloads were down 1 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: 7/3/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	40.1	32.8	25.7	15.6	7.5	22.4	24.0
	Average over last 4 weeks	32.1	35.7	26.0	16.0	21.1	17.2	24.7
	Average of same 4 weeks last year	19.7	33.7	19.3	19.6	9.8	26.0	21.3
Average grain unit train speeds (miles per hour)	This week	21.0	17.5	23.2	23.1	24.7	17.7	21.2
	Average over last 4 weeks	20.6	17.2	23.0	22.9	23.5	19.4	21.1
	Average of same 4 weeks last year	21.7	18.6	25.0	22.3	23.7	16.0	21.2

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

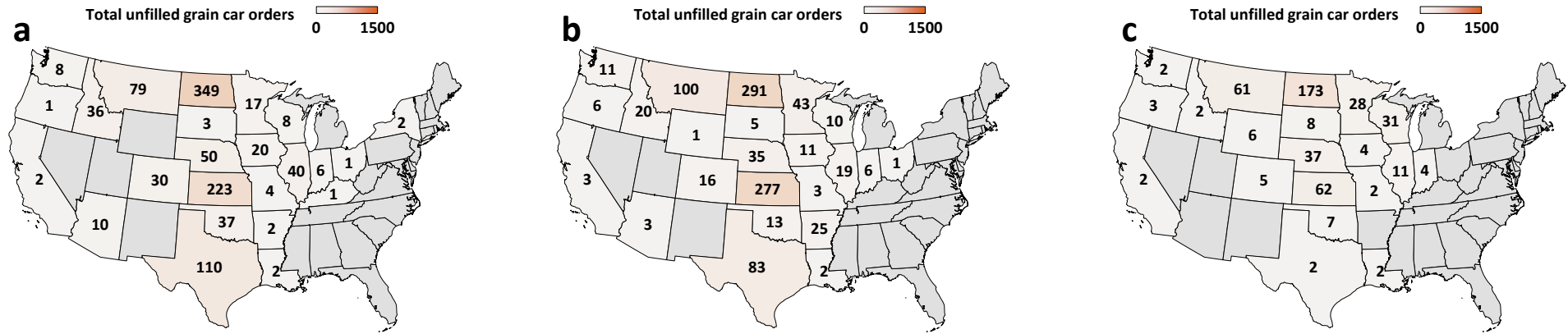
For the week ending: 7/3/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	61	7	311	48	8	209	644
	Average over last 4 weeks	59	18	299	45	10	171	601
	Average of same 4 weeks last year	24	7	256	82	10	378	757
Average number of loaded grain cars not moved in over 48 hours	This week	82	313	527	58	9	139	1,129
	Average over last 4 weeks	67	272	486	45	22	176	1,068
	Average of same 4 weeks last year	27	187	315	65	14	470	1,078
Average number of grain unit trains held	This week	0	1	6	3	0	5	15
	Average over last 4 weeks	0	1	5	4	0	3	13
	Average of same 4 weeks last year	1	1	3	5	0	7	16
Total unfilled manifest grain car orders	This week	12	0	565	429	0	35	1,041
	Average over last 4 weeks	10	2	517	388	0	66	982
	Average of same 4 weeks last year	5	2	258	86	0	128	479

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](#).

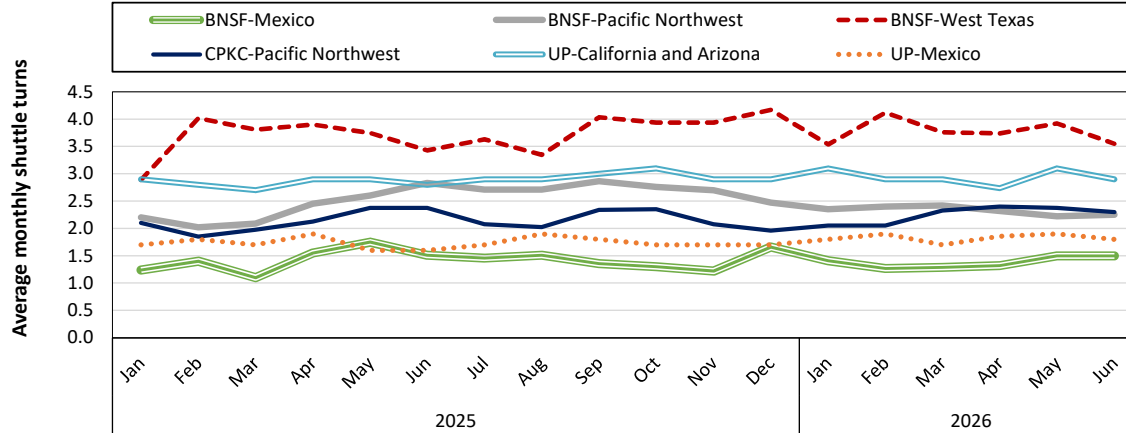
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 7/3/2026 (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

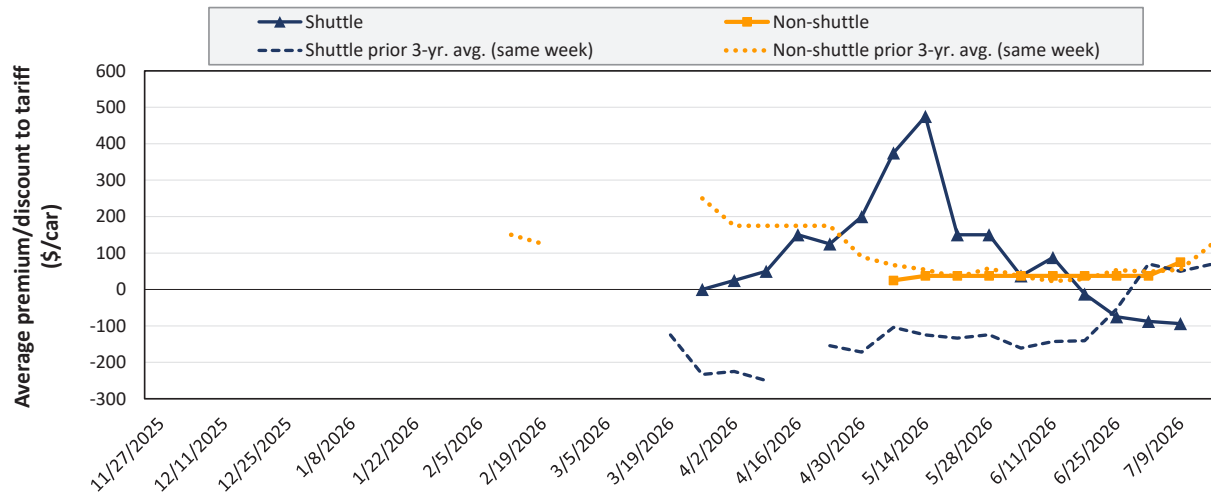


In June 2026, BNSF Railway's average monthly grain shuttle turns were 1.5 to Mexico, 2.3 to the Pacific Northwest, and 3.6 to West Texas. CPKC's shuttle turns averaged 2.3 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.8 to 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 July 2026



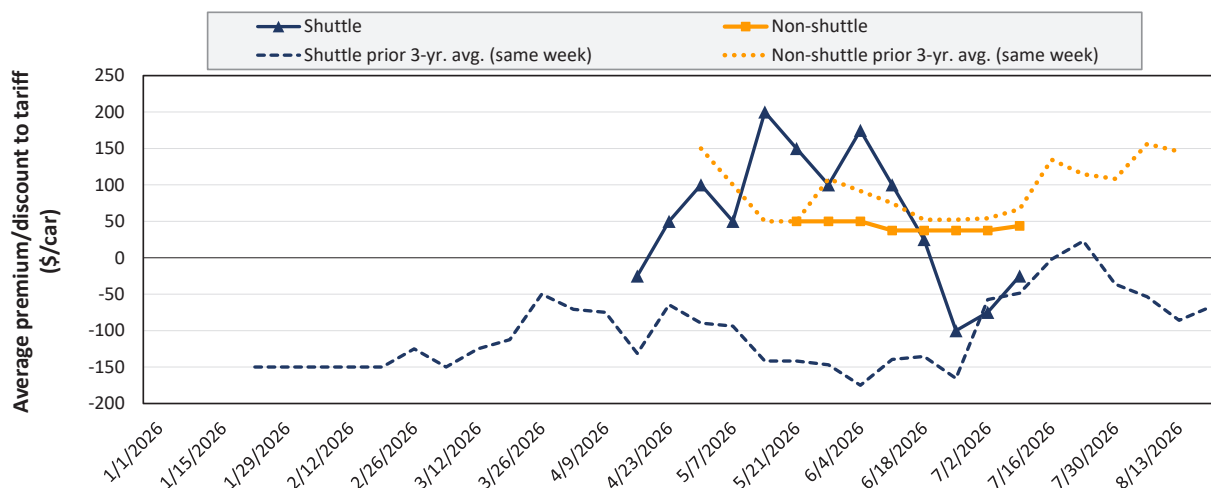
Average non-shuttle bids/offers rose \$38 this week, and are at the peak.

Average shuttle bids/offers fell \$6 this week and are \$569 below the peak.

7/9/2026	BNSF	UP
Non-Shuttle	\$75	n/a
Shuttle	\$0	-\$188

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



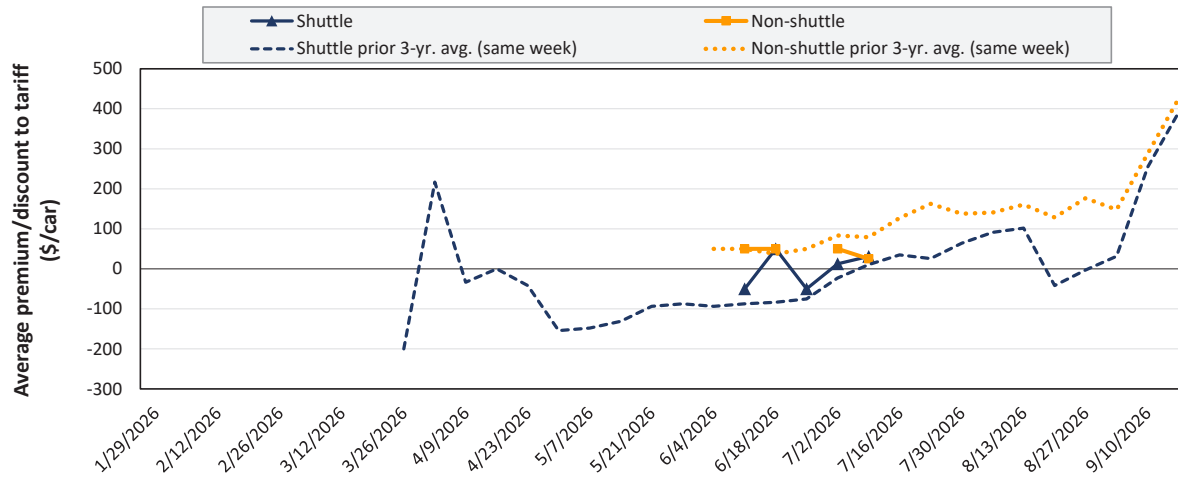
Average non-shuttle bids/offers rose \$6 this week, and are \$6 below the peak.

Average shuttle bids/offers rose \$50 this week and are \$225 below the peak.

7/9/2026	BNSF	UP
Non-Shuttle	\$25	\$63
Shuttle	-\$50	\$0

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

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



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

Average shuttle bids/offers rose \$19 this week and are \$19 below the peak.

	7/9/2026	BNSF	UP
Non-Shuttle		\$25	n/a
Shuttle		\$63	\$0

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

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

For the week ending: 7/9/2026		Delivery period					
		Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26
Non-shuttle	BNSF	75	25	25	n/a	n/a	n/a
	Change from last week	25	-25	-25	n/a	n/a	n/a
	Change from same week 2025	38	-75	-75	n/a	n/a	n/a
	UP	n/a	63	n/a	n/a	n/a	n/a
	Change from last week	n/a	38	n/a	n/a	n/a	n/a
	Change from same week 2025	n/a	138	n/a	n/a	n/a	n/a
Shuttle	BNSF	0	-50	63	1,150	n/a	n/a
	Change from last week	-25	0	-38	150	n/a	n/a
	Change from same week 2025	-100	-13	63	650	n/a	n/a
	UP	-188	0	0	300	n/a	n/a
	Change from last week	12	100	75	0	n/a	n/a
	Change from same week 2025	-188	163	125	-300	n/a	n/a
	CPKC	n/a	0	-50	n/a	n/a	n/a
	Change from last week	n/a	n/a	50	n/a	n/a	n/a
	Change from same week 2025	n/a	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.

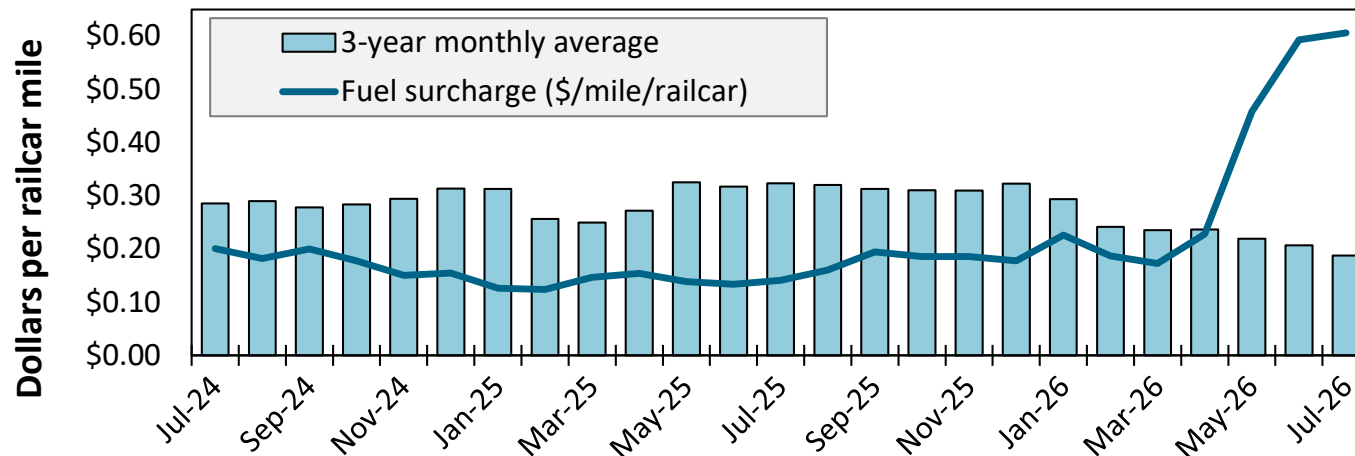
Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, July 2026

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

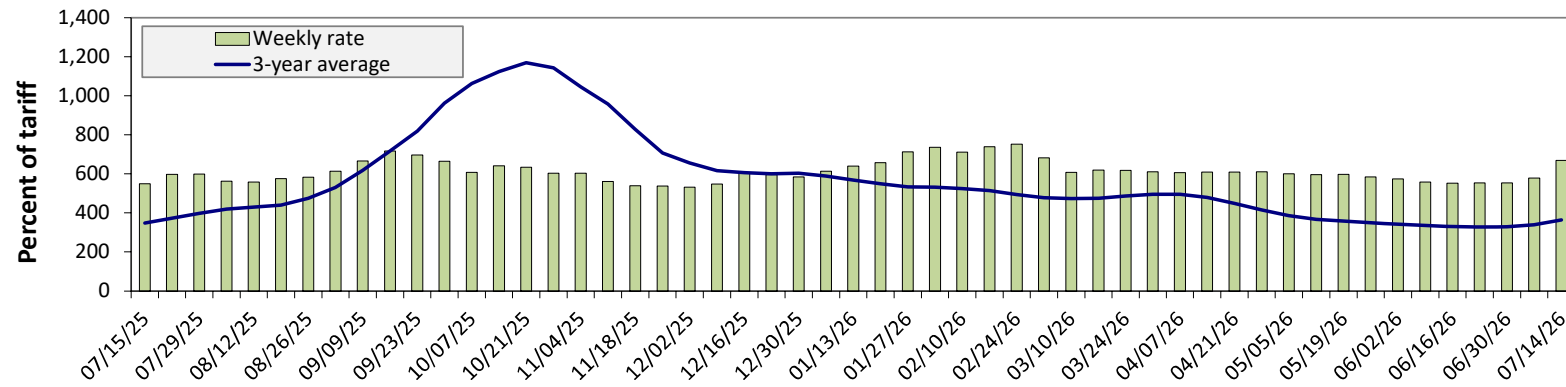


July 2026: \$0.61/mile, up 2 cents from last month's surcharge of \$0.59/mile; up 47 cents from the July 2025 surcharge of \$0.14/mile; and up 42 cents from the July prior 3-year average of \$0.19/mile.

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 14: 16 percent higher than the previous week; 22 percent higher than last year; and 84 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	7/14/2026	734	703	669	477	494	419
	7/7/2026	688	593	578	389	394	378
\$/ton	7/14/2026	45.43	37.40	31.04	19.03	23.17	13.16
	7/7/2026	42.59	31.55	26.82	15.52	18.48	11.87
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	24	22	22	19	40	31
	3-year avg.	63	79	84	71	77	67
Rate	August	750	725	694	616	608	589
	October	931	909	886	823	884	769

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](#).

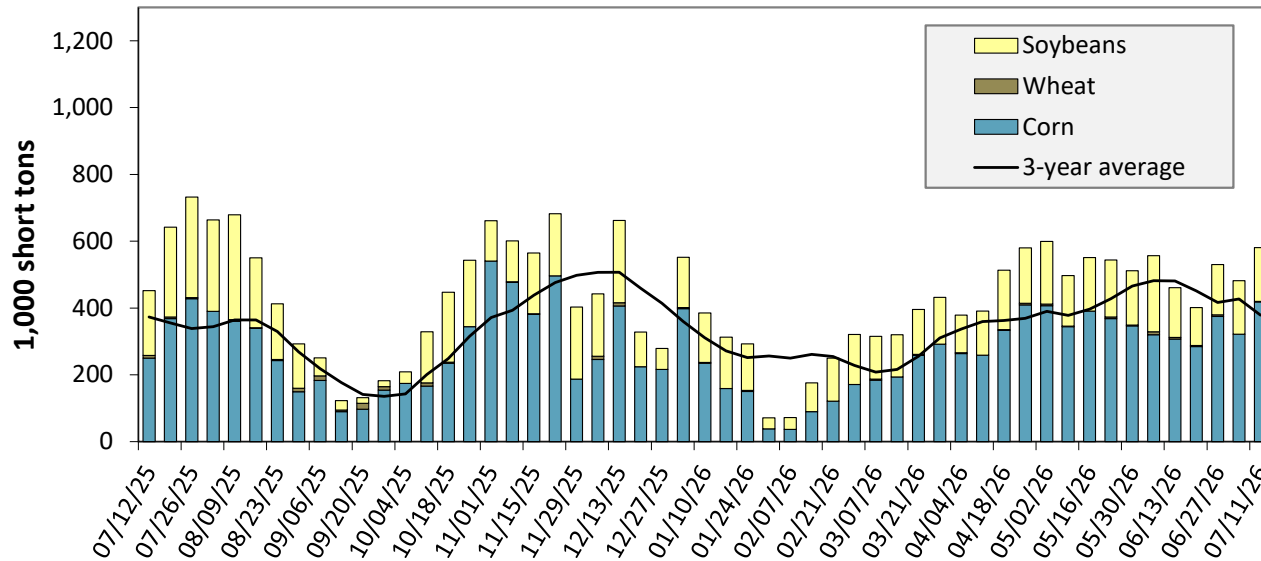
Source: USDA, Agricultural Marketing Service.

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 11: 29 percent higher than last year and 54 percent higher than the 3-year average.

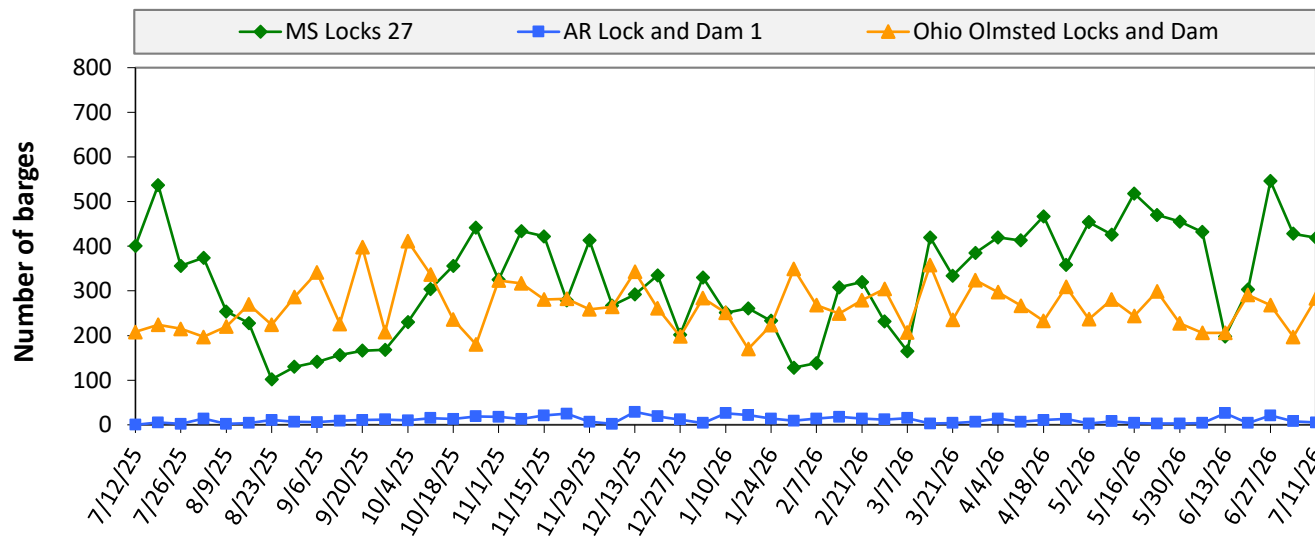
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 07/11/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	134	0	64	0	198
Mississippi River (Winfield, MO (L25))	302	0	121	0	422
Mississippi River (Alton, IL (L26))	397	2	152	0	550
Mississippi River (Granite City, IL (L27))	418	2	161	0	580
Illinois River (La Grange)	23	0	19	0	42
Ohio River (Olmsted)	26	3	47	0	76
Arkansas River (L1)	0	13	0	0	13
Weekly total - 2026	443	18	208	0	669
Weekly total - 2025	267	71	216	0	554
2026 YTD	9,133	504	5,586	45	15,267
2025 YTD	11,321	650	5,576	108	17,654
2026 as % of 2025 YTD	81	78	100	42	86
Last 4 weeks as % of 2025	88	55	95	0	88
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.

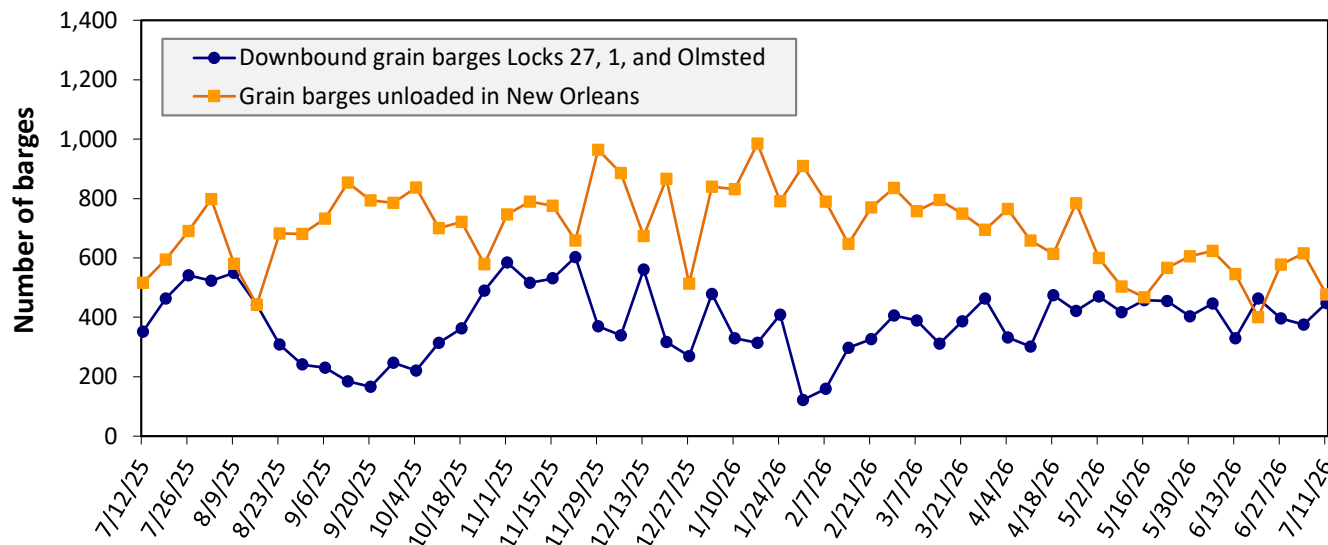
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending July 11: 707 barges transited the locks, 74 barges more than the previous week, and 43 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 11: 448 barges moved down river, 73 more than the previous week; 477 grain barges unloaded in the New Orleans Region, 23 percent fewer than the previous week.

Note: Olmsted = Olmsted Locks and Dam.

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

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

River	Origin	\$/ton			Current month % change from the same month	
		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.

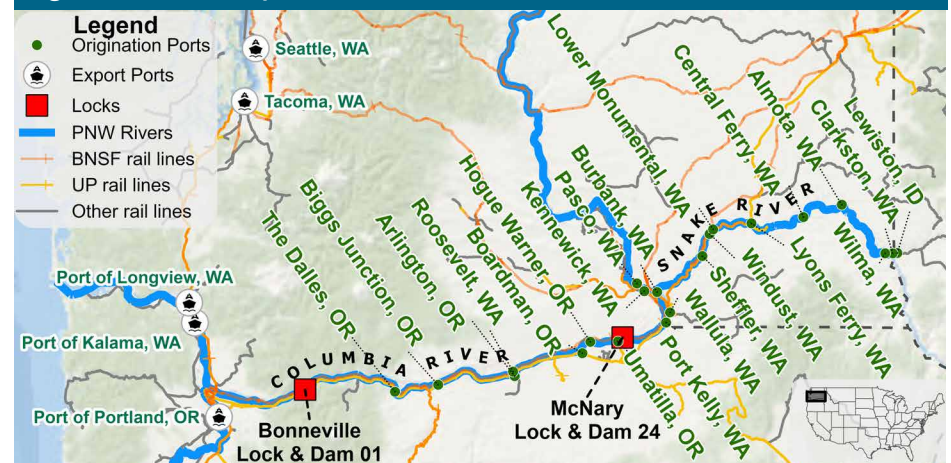
Table 12. Monthly barged grain movements, Columbia-Snake (1,000 tons)

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.

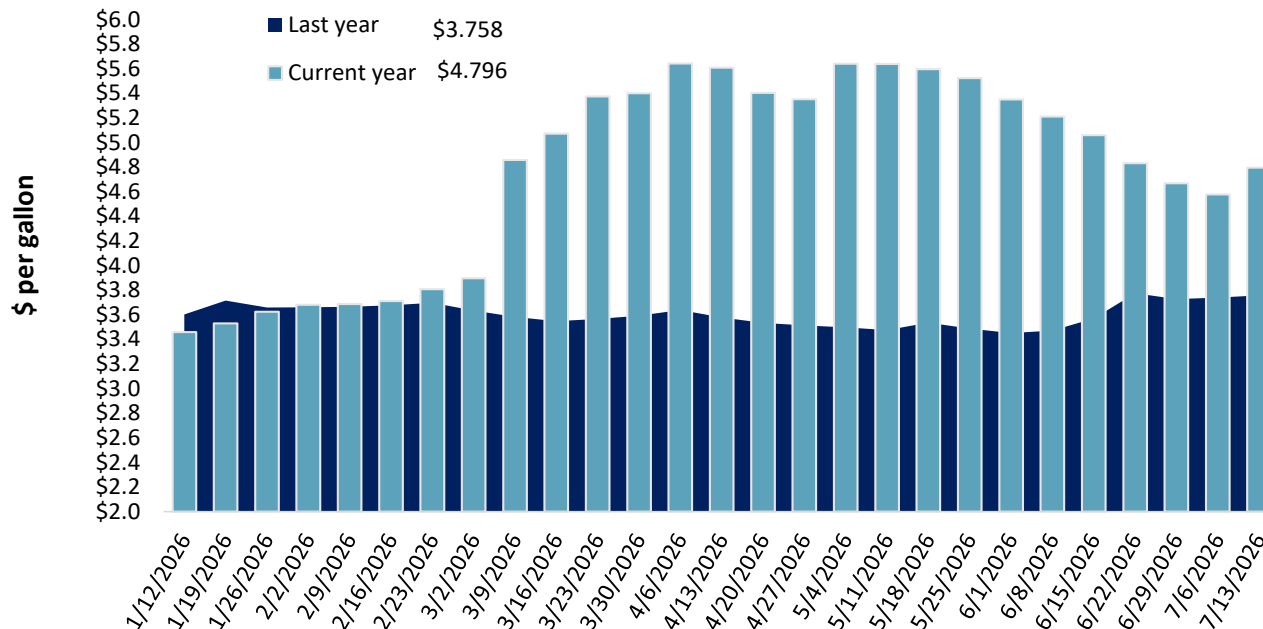
Table 13. Retail on-highway diesel prices, week ending 7/13/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.894	0.200	1.101
	New England	5.189	-0.031	1.220
	Central Atlantic	5.204	0.058	1.251
	Lower Atlantic	4.748	0.271	1.032
II	Midwest	4.659	0.201	0.926
III	Gulf Coast	4.546	0.321	1.143
IV	Rocky Mountain	4.600	0.116	0.887
V	West Coast	5.550	0.125	1.052
	West Coast less California	5.052	0.188	0.930
	California	6.126	0.053	1.194
Total	United States	4.796	0.218	1.038

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 13, the U.S. average diesel fuel price increased 21.8 cents from the previous week to \$4.796 per gallon, 103.8 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 07/9/2026	874	645	1,318	1,323	142	4,303	13,221	3,142	20,666
	This week year ago	2,297	1,123	1,738	825	88	6,071	10,353	4,177	20,601
	Last 4 wks. as % of same period in prior marketing year	41	70	74	159	170	72	146	88	112
Current shipped (cumulative) exports sales	Current MYTD	672	326	544	452	50	2,043	73,058	38,182	113,283
	Prior MYTD	950	262	576	341	40	2,169	59,114	46,470	107,753
	Current MYTD as % of prior MYTD	71	124	94	133	124	94	124	82	105
	Total 2025/26	8,243	3,202	6,078	5,207	622	23,419	-	-	23,419
	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 7/9/2026	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	2,944	24,606	22,493	9	19,839
Japan	1452	15,701	12,989	21	10,478
Colombia	405	8,439	7,407	14	5,493
China	0	0	33	-100	3,461
Korea	746	8,715	6,146	42	3,127
Top 5 importers	5,547	57,462	49,068	17	42,399
Total U.S. corn export sales	6,860	86,280	69,467	24	54,276
% of YTD current month's export projection	8%	102%	95%	-	-
Change from prior week	311	315	98	-	-
Top 5 importers' share of U.S. corn export sales	81%	67%	71%	-	78%
USDA forecast July 2026	81,284	84,459	72,978	16	-
Corn use for ethanol USDA forecast July 2026	142,240	140,970	138,075	2	-

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 7/9/2026	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	1,256	12,362	22,479	-45	26,078
Mexico	594	-0	5,064	-100	4,762
Japan	127	2,264	2,052	10	2,107
Egypt	60	4,948	3,399	46	2,098
Indonesia	42	2,356	1,954	21	1,997
Top 5 importers	2,080	21,929	34,948	-37	37,042
Total U.S. soybean export sales	4,598	41,324	50,648	-18	48,941
% of YTD current month's export projection	10%	100%	98%	-	-
Change from prior week	1770	188	272	-	-
Top 5 importers' share of U.S. soybean export sales	45%	53%	69%	-	76%
USDA forecast, July 2026	45,178	41,368	51,492	-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 7/9/2026	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	1,363	1,444	-6	3,744
Philippines	806	818	-2	2,677
Japan	897	725	24	2,050
Korea	725	480	51	1,888
Taiwan	277	303	-9	1,005
Nigeria	195	279	-30	878
China	NA	0	NA	863
Indonesia	67	268	-75	746
Thailand	175	233	-25	690
Vietnam	13	153	-92	581
Top 10 importers	4,518	4,703	-4	15,121
Total U.S. wheat export sales	6,346	8,240	-23	21,015
% of YTD current month's export projection	30%	33%	-	-
Change from prior week	235	494	-	-
Top 10 importers' share of U.S. wheat export sales	71%	57%	-	72%
USDA forecast, July 2026	21,092	24,712	-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)

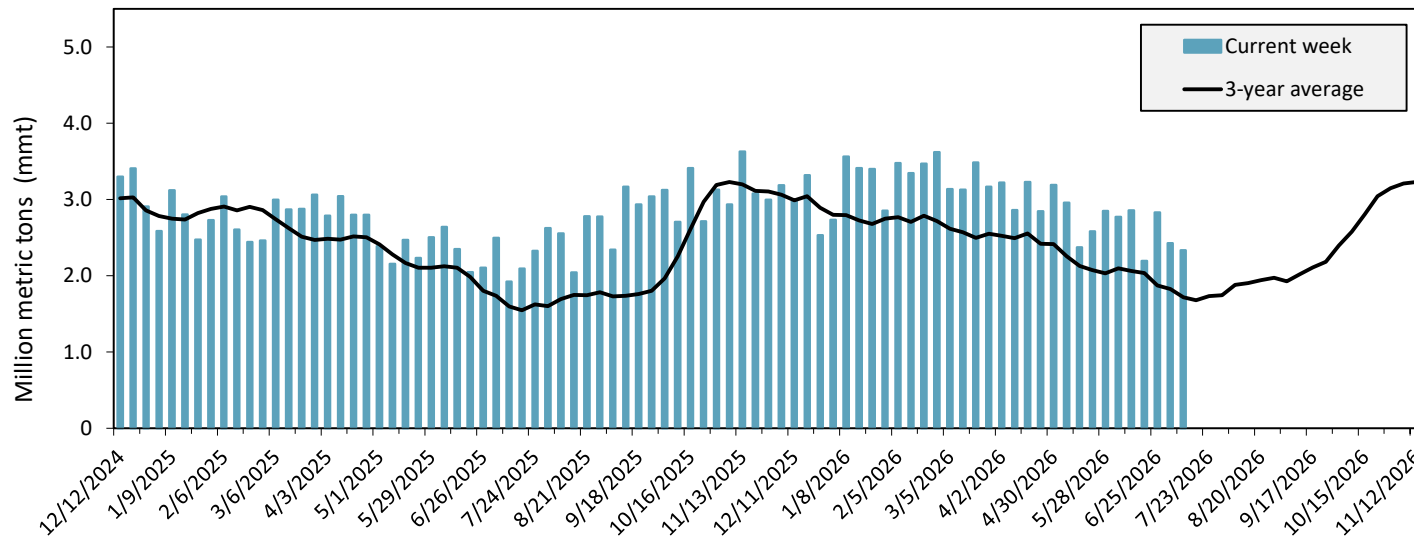
Port regions	Commodity	For the week ending 07/09/2026	Previous week	Current week as % of previous	2026 YTD	2025 YTD	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	594	584	102	14,490	13,574	107	145	228	24,214
	Soybeans	0	66	0	4,162	1,966	212	n/a	n/a	2,957
	Wheat	196	0	n/a	5,279	5,715	92	98	87	12,271
	All grain	790	650	121	24,226	21,362	113	134	174	39,721
Mississippi Gulf	Corn	602	699	86	20,239	20,313	100	91	121	37,115
	Soybeans	298	334	89	12,563	10,664	118	181	150	23,350
	Wheat	115	82	140	1,719	1,840	93	107	109	3,980
	All grain	1,015	1,116	91	34,521	32,818	105	106	126	64,484
Texas Gulf	Corn	31	69	45	887	170	522	718	536	590
	Soybeans	0	0	n/a	100	106	94	n/a	0	1,431
	Wheat	23	11	207	1,831	2,097	87	29	52	4,690
	All grain	54	80	67	6,151	2,600	237	98	121	7,774
Interior	Corn	276	295	94	8,475	7,203	118	104	130	15,546
	Soybeans	119	142	84	3,927	3,541	111	124	142	7,713
	Wheat	40	51	79	1,591	1,581	101	82	91	3,104
	All grain	436	490	89	14,269	12,647	113	105	127	26,888
Great Lakes	Corn	0	21	0	273	21	n/a	n/a	n/a	414
	Soybeans	0	0	n/a	20	0	n/a	n/a	n/a	63
	Wheat	0	0	n/a	168	138	122	95	139	434
	All grain	0	21	0	460	158	290	258	376	911
Atlantic	Corn	36	65	55	981	182	538	849	n/a	607
	Soybeans	2	1	343	600	465	129	35	35	1,085
	Wheat	0	2	0	9	36	24	108	116	81
	All grain	38	68	56	1,590	684	233	507	577	1,773
All Regions	Corn	1,540	1,735	89	45,345	41,463	109	116	159	78,486
	Soybeans	419	542	77	21,882	16,846	130	163	157	36,852
	Wheat	374	147	254	10,596	11,407	93	80	88	24,560
	All grain	2,333	2,427	96	81,726	70,373	116	116	142	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.

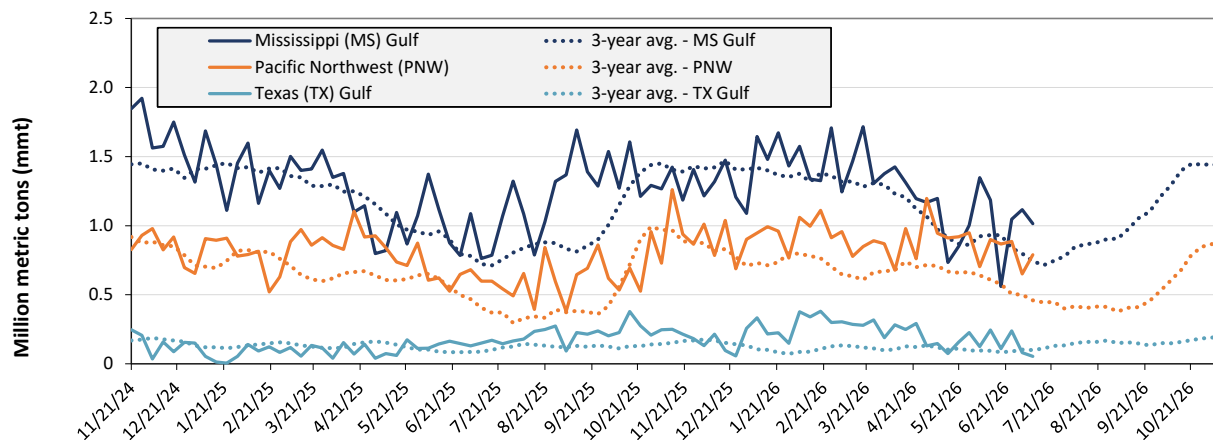
The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 46 percent of U.S.-grown wheat, 47 percent of U.S.-grown soybeans, and 15 percent of the U.S.-grown corn. In 2025, approximately 51 percent of the U.S. grain-export shipments departed through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

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



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 07/09/26 inspections (mmt):

MS Gulf: 1.01

PNW: 0.79

TX Gulf: 0.05

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 9	down 33	down 11	up 21
Last year (same 7 days)	up 44	up 4	up 41	up 43
3-year average (4-week moving average)	up 37	down 46	up 27	up 72

Source: USDA, Federal Grain Inspection Service.

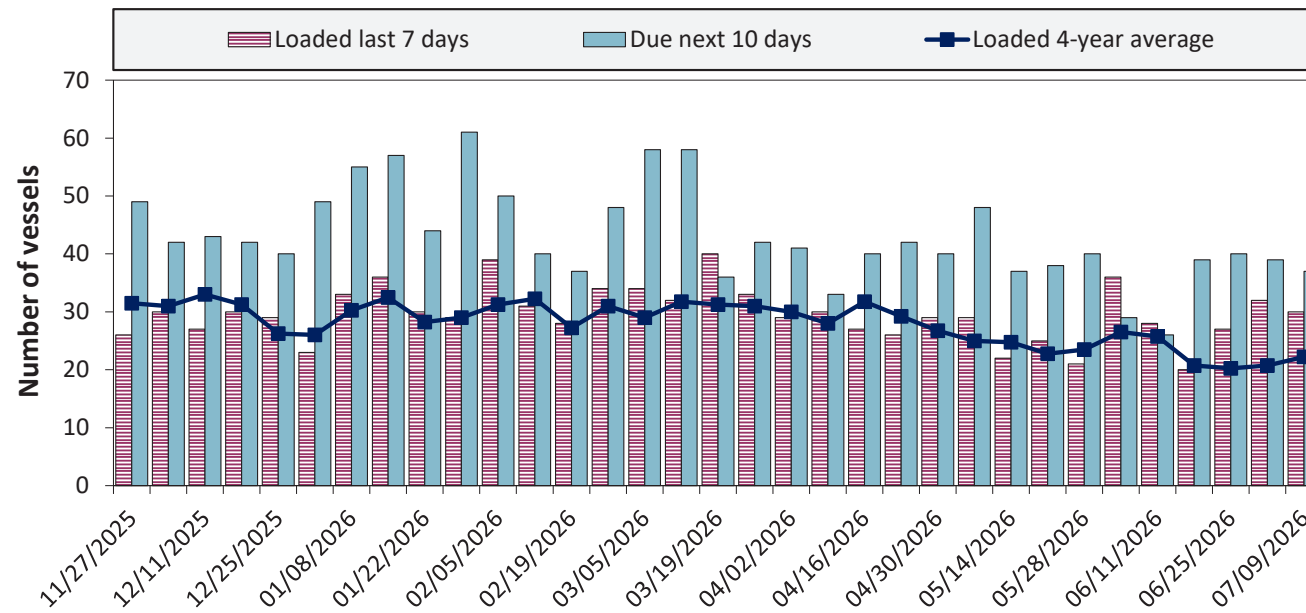
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
7/9/2026	26	30	37	9
7/2/2026	21	32	39	10
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

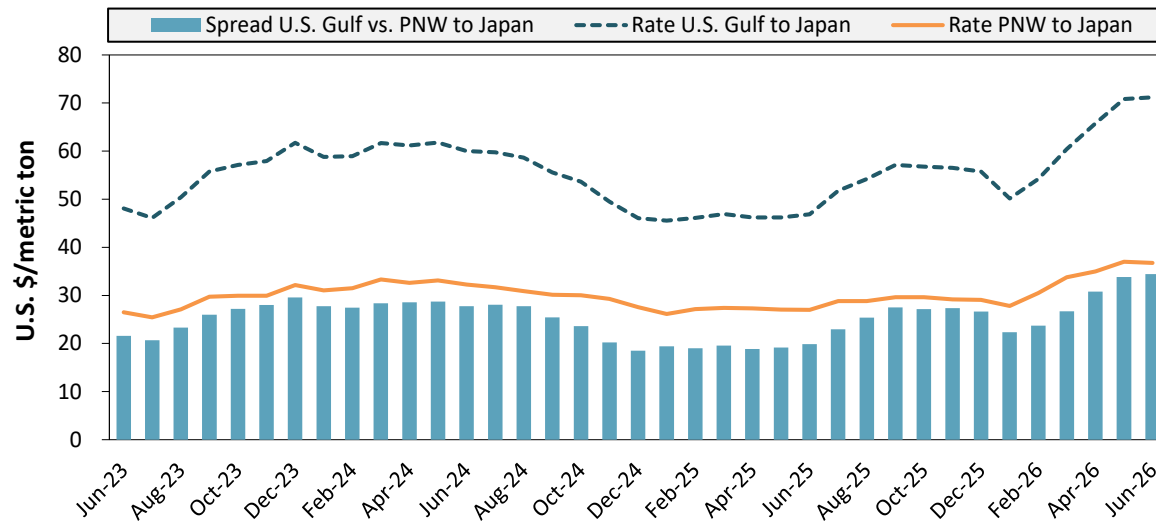


Week ending 07/09/26, number of vessels	Loaded	Due
Change from last year	30%	6%
Change from 4-year average	35%	-2%

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 07/11/2026

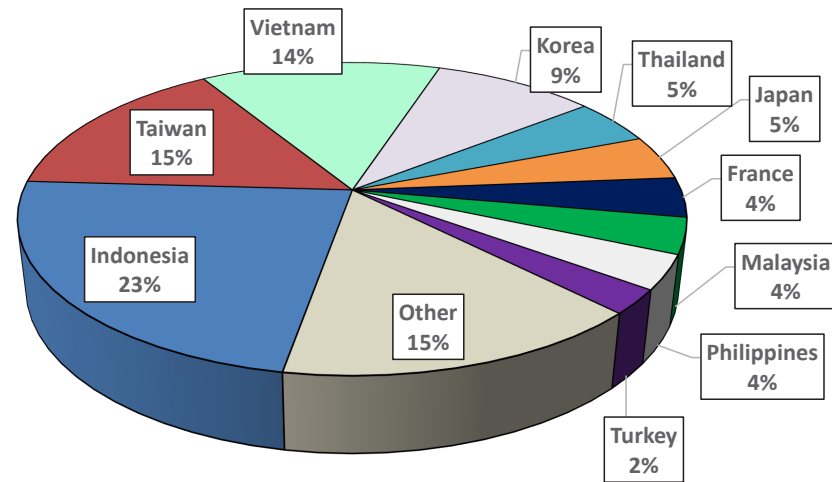
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Colombia	Soybean meal	Mar 24, 2026	May 1/10, 2026	50,000	31.60
PNW	Japan	Heavy grain	May 21, 2026	Jun 20/Jul 21, 2026	65,000	47.25
PNW	Bangladesh	Soybeans	Mar 11, 2026	May 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	China	Heavy grain	May 26, 2026	Jun 13/20, 2026	66,000	54.25
Brazil	Poland	Heavy grain	Jul 8, 2026	Aug 14/21, 2026	60,000	30.90

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.

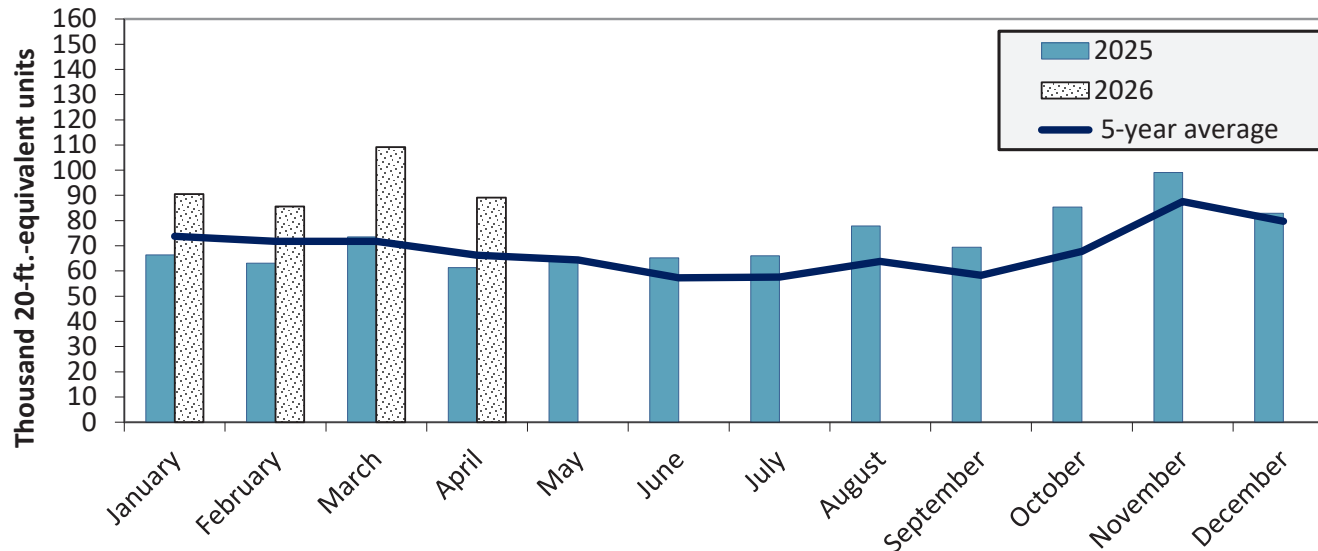
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Apr 2026



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.

Title	Name	Email	Phone
Coordinators	Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720-0119
	Maria Williams	maria.williams@usda.gov	(202) 690-4430
	Bernadette Winston	bernadette.winston@usda.gov	(202) 690-0487
Grain Transportation Indicators	Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720-0119
Rail Transportation	Jesse Gastelle	jesse.gastelle@usda.gov	(202) 690-1144
	Peter Caffarelli	petera.caffarelli@usda.gov	(202) 690-3244
	Austin Hunt	austin.hunt@usda.gov	(540) 681-2596
Barge Transportation	Kranti Mulik	kranti.mulik@usda.gov	(202) 756-2577
	Edmund Outlaw	edmund.outlaw@usda.gov	(301) 448-0578
Truck Transportation	Kranti Mulik	kranti.mulik@usda.gov	(202) 756-2577
Grain Exports	Kranti Mulik	kranti.mulik@usda.gov	(202) 756-2577
	Bernadette Winston	bernadette.winston@usda.gov	(202) 690-0487
Ocean Transportation	Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@usda.gov	(202) 720-0119
	Jesse Gastelle (Container movements)	jesse.gastelle@usda.gov	(202) 690-1144
Editor	Maria Williams	maria.williams@usda.gov	(202) 690-4430
Visual Information Specialists	Jessica Ladd	jessica.ladd@usda.gov	n/a
	Sharon C. Williams	sharonc.williams@usda.gov	(202) 720-2848

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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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