



Grain Transportation Report

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USDA Corn Production Estimate Falls; Soybean Estimate Rises. As harvest gets underway (especially in the South), USDA/National Agricultural Statistics Service's September [Crop Production report](#) forecasts U.S. farmers will produce 15.8 billion bushels (bbu) of corn and 4.5 bbu of soybeans this fall—down 213 million bushels (mbu) and up 16 mbu, respectively, from last month's forecast. By State, the largest month-to-month forecast changes (for both crops combined) were in North Dakota (−73 mbu); Iowa (+58 mbu); Kansas (−53 mbu); Nebraska (−51 mbu); and Illinois (−43 mbu).

USDA's September [World Agricultural Supply and Demand Estimates report](#) shows less domestic corn use (−150 mbu) and more soybean exports (+25 mbu) for marketing year (MY) 2026/27 than the August report. If these totals are realized, MY 2026/27 corn use—for both domestic and export purposes—would be the second highest on record, and domestic soybean use would set a new record, spurred by growth in soybean crushing.

Through the [week ending September 13](#), the corn and soybean harvests are 8 percent and 6 percent complete, respectively—both ahead of the 5-year average pace.

Diesel Prices Surpass \$6 per Gallon. For the week ending September 14, the [U.S. average diesel fuel price](#) rose 31.8 cents from the previous week to a record \$6.285 per gallon—254.6 cents above the same week last year. While up across all U.S. regions, diesel prices were highest on the West Coast. For the week ending September 4, U.S. distillate fuel inventories were 106.3 million barrels—13 percent below the 5-year average.

Shipping through the Strait of Hormuz has dropped to its lowest since the U.S.-Iran conflict began: four commodity vessels transited the strait on Monday, down from 10 the previous day and down from roughly 125 large commercial vessels per day before the conflict—according to preliminary [Kpler data](#). The closure of Saudi Arabia's crucial oil pipeline has placed further pressure on global oil supplies.

Reduced shipping activity has had ripple effects: constrained crude oil flows increase oil prices, which raise fuel prices. Higher fuel prices, in turn, elevate shipping costs, and higher diesel prices can impact harvest, drying, and hauling expenses for farmers.

Railroads To Seek Broad Trackage Rights if UP/NS Merger Is Approved. On September 9, parties in the [Union Pacific Railroad/Norfolk Southern Railway \(UP/NS\) merger proceeding](#) submitted [descriptions of their responsive applications](#) to the Surface Transportation Board (STB). All remaining Class I railroads— BNSF Railway (BNSF), Canadian National Railway (CN), Canadian Pacific Kansas City (CPKC), and CSX Transportation (CSX)—along with several short line railroads, filed responses. BNSF, CPKC, and CSX urged STB to reject the UP/NS merger, but outlined conditions they would seek if it is approved.

[BNSF](#) requests 824 miles of NS trackage rights to eastern Pennsylvania and proposes a neutral Gulf Coast switching carrier. [CSX](#) seeks access to Kansas City, NS trackage rights in eastern Pennsylvania, and rights to reach the Port of Virginia. [CPKC](#) seeks eight conditions—including strengthening trackage rights in Texas that CPKC uses for cross-

border traffic with Mexico (at Laredo, TX). CPKC is also seeking trackage rights to gain a more direct route between St. Louis and Kansas City.

[CN's filing](#) details an agreement it made with UP earlier this year ([Grain Transportation Report, July 23, 2026, first highlight](#)).

Iowa Waives Weight Limits for Grain Transportation. Effective until October 10, Iowa has issued weight-limit [exemptions](#) for vehicles transporting corn, soybeans, hay, straw, silage, stover, fertilizer (dry, liquid, and gas), manure (dry and liquid), and distiller grains. The waiver was granted to help mitigate traffic concerns during harvest time.

During the exemption period, weight limits and permits are waived for vehicles up to 90,000 pounds gross weight. The waiver also covers vehicles that do not exceed the maximum axle weight limit (of 20,000 pounds) by more than 12.5 percent—as long as they comply with posted limits on roads and bridges. While excluding use of the Interstate Highway System, the waiver applies to loads transported on all Iowa State highways.

According to the President of the Iowa Corn Growers Association, the waiver will allow a 500-acre Iowa corn farmer to use 13 fewer truckloads and a 1,000-acre farmer to use 26 fewer truckloads during this harvest. “With high fuel prices, this is a significant cost savings for farmers,” he said.

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 September 10, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2026/27 totaled 37.97 million metric tons (mmt), up 5 percent from the same time last year.

Net [corn export sales](#) for MY 2026/27, which began September 1, were 1.03 mmt. Net [soybean export sales](#) for MY 2026/27, which also began September 1, were 1.70 mmt. Net [wheat export sales](#) for MY 2026/27 were 0.33 mmt, up 68 percent from last week.

Rail

U.S. Class I railroads originated 27,445 [grain carloads](#) during the week ending September 5. This was a 4-percent increase from the previous week, 24 percent more than last year, and 31 percent more than the 3-year average.

Average September [shuttle secondary railcar bids/offers](#) (per car) were \$592 above tariff for the week ending September 10. This was \$150 less than last week and \$563 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$100 above tariff. This was \$81 more than last week and \$25 more than this week last year.

Barge

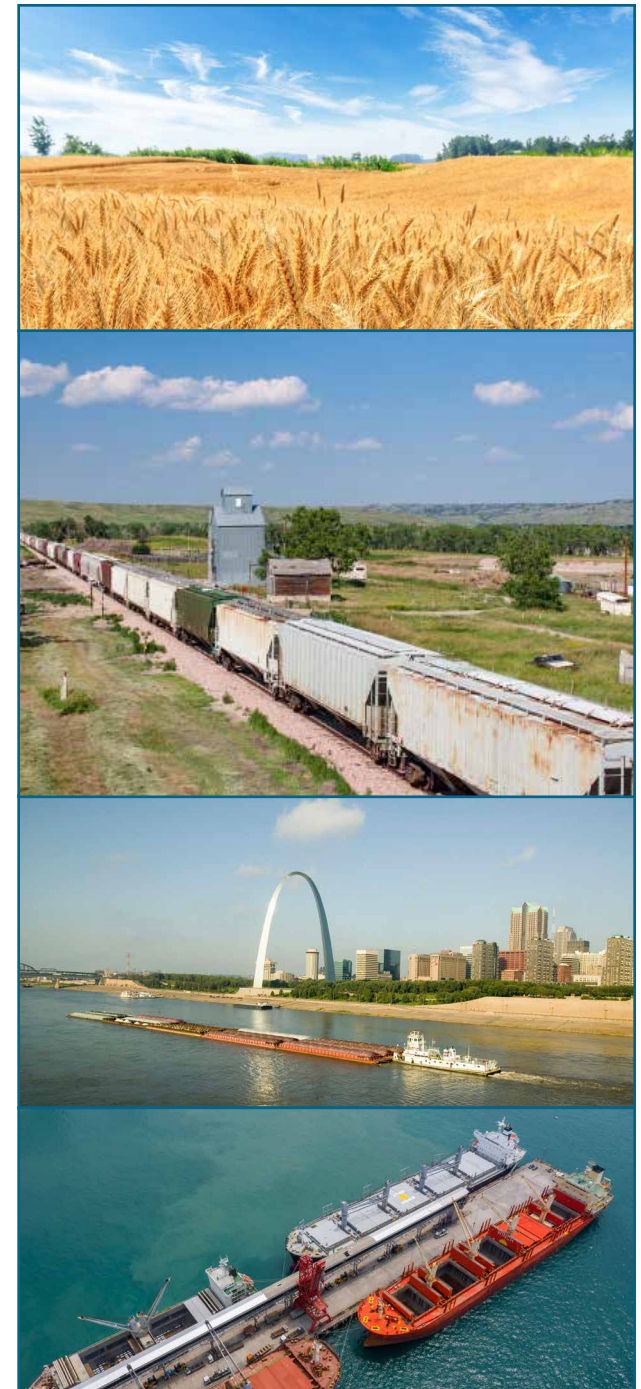
For the week ending September 12, [barged grain movements](#) totaled 435,800 tons. This was 21 percent more than the previous week and 73 percent more than the same week last year.

For the week ending September 12, 315 [barges moved down river](#), 50 more than the previous week. There were 726 grain barges unloaded in the New Orleans region, 2 percent more than the previous week.

Ocean

For the week ending September 10, 22 [oceangoing grain vessels](#) were loaded in the Gulf—27 percent fewer than the same period last year. Within the next 10 days (starting September 11), 49 vessels were expected to be loaded—11 percent fewer than the same period last year.

As of September 10, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$76.75, up 1 percent from the previous week. The rate from the Pacific Northwest to Japan was \$37.75 per mt, up 1 percent from the previous week.



Changes to Corn Rail Tariff Rates in MY 2026/27

After last year's historic corn harvest and record export activity propelled rail grain carloads to multi-decade highs, USDA projected a smaller corn crop for this year, though the estimate is still robust by historical standards. Railroads are adjusting their rail tariff rates, and their relatively minor pricing changes this year signal expectations for continued strong rail demand (even if down from last year's extreme highs).

This article begins by recapping corn supply and demand in marketing year (MY) 2025/26 and contributing factors—including changes to rail tariff rates.¹ Next is a summary of changes to corn tariff rates in MY 2026/27—which will be incorporated into [Grain Transportation Report \(GTR\) table 7](#) and [GTR table 8](#) starting next month.² The article ends with a look at MY 2026/27 supply and demand estimates for corn, based on the latest USDA data.

Review of MY 2025/26—Massive Corn Harvest Propels Grain Rail Carloads

In MY 2025/26, the largest corn crop on record drove both corn exports and domestic use to record highs. The crop was especially large in the western Corn Belt, which lacks barge access and relies on rail transportation. Railroads slightly adjusted rail tariff rates.

Corn Production Highest in the West. In 2025, U.S. farmers harvested a record 17.0 billion bushels (bbu) of corn—17 percent above the prior 5-year average and 1.7 bbu above the previous record (from 2023).³ While the 2025 corn crop was above average in most States, the largest increases were in the western Corn Belt. As follows (with increases from average), six States were up more than 250 million bushels (mbu): South Dakota (+314.9 mbu); Nebraska (+304.7 mbu); North Dakota (+299.2 mbu); Iowa (+283.4 mbu); Minnesota (+272.0 mbu); and Kansas (+264.8 mbu).

Record Exports Spur Corn Demand.

Record corn production in MY 2025/26 met with strong demand for both domestic use and exports. USDA projects total domestic corn use in MY 2025/26 will total 13.3 bbu—up 8 percent from average and an all-time record, if realized. Within domestic use, “food, alcohol, and industrial use” is estimated at 6.9 bbu (up 3 percent from average), and “feed and residual” use is estimated at 6.4 bbu (up 13 percent from average).

The largest increase in corn demand, however, came from exports. From September 2025 to July 2026 (the first 11 months of MY 2025/26), [U.S. corn exports](#) totaled 3.1 bbu—up 40 percent from average. USDA projects total MY

2025/26 U.S. corn exports at 3.4 bbu. The spike in corn exports is a key reason for this year's elevated rail grain carloads ([GTR fig. 3](#)).

From September 2025 to July 2026, by customs district (with increases from average)—corn exports were as follows: in New Orleans, LA (+17 percent); Pacific Northwest (PNW) (+104 percent); U.S.-Mexico border crossings (+33 percent); Norfolk, VA (+468 percent); and Houston-Galveston, TX (+144 percent). The stark rise in PNW corn exports (up nearly 500 mbu from average) owed to excess corn supplies in the nearby western Corn Belt, as well as below-average soybean exports in fall 2025, which freed up export capacity for corn ([GTR, January 1, 2026](#)).

Railroads Made Small Tariff Rate Adjustments.

In October 2025, BNSF Railway (BNSF) kept corn tariff rates to PNW export terminals the same, while cutting rates to Hereford, TX, feedlots (in the Texas panhandle), on a lane-by-lane basis. The largest rate cuts (–\$600 to –\$500 per car) were for origins in southern Nebraska ([GTR, July 24, 2025](#)). Also in October 2025, Union Pacific Railroad (UP) reduced its corn tariff rates by \$150 per car—both for domestic destinations and the U.S.-Mexico border. Canadian Pacific Kansas City (CPKC) kept most of its corn tariff rates the same.

1 In this article, tariff rates apply to shuttle trains using large, covered hoppers (with a capacity over 5,000 cubic feet). Corn overwhelmingly moves in shuttle trains, which are made up of 110+ cars and move as one unit from a single origin to a single destination.

2 Although corn's marketing year runs from September 1 to August 31, most railroads adjust corn tariffs in October.

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

Tariff Rate Adjustments in MY 2026/27

This year, railroad corn tariff rate adjustments are relatively minor—with most rising by \$200 per car. However, selective rate cuts by BNSF to Mexico may shift export corn volumes from UP to BNSF.

BNSF Rate Adjustments to PNW and Hereford. Beginning in October, BNSF will raise its tariff rates to PNW export terminals by \$200 per car—across all origins. To Hereford, BNSF will make selective rate adjustments. Most BNSF-served origins will have a rate increase of \$200 per car. However, 37 origins (in Illinois, Iowa, Kansas, and South Dakota) will have no rate change, and 27 origins (in Iowa, Nebraska, Minnesota, and South Dakota) will have a rate increase of less than \$200 per car. Two Iowa origins (Pleasant Hill and Osceola) will see a rate cut to Hereford.

BNSF Tariff Rate Spreads. Most of BNSF's corn tariff rates to major destinations (outside the PNW) are priced as a spread from the Hereford tariff rate. Typically, these destination rate spreads are consistent from year to year, but this year (effective in October), BNSF is adjusting them. Most notably, BNSF will eliminate the current \$200 per car rate spread between Hereford and the U.S.-Mexico border. For origins receiving a \$200 per car rate increase to Hereford, these same origins will see no change in their rates to Mexico. Origins with no change to Hereford (i.e., those in Illinois, Iowa, Kansas, and South Dakota) will see a \$200 rate cut to Mexico.

To southwest Kansas feedlots corn tariff rates will be priced \$1,400 per car below Hereford (widened from the current spread of \$1,020 per car below Hereford); corn tariff rates to Group 62 destinations (in Colorado) will be priced \$1,800 below Hereford (widened from the current spread of \$1,180 per car below Hereford); corn tariff rates to McNab, AR, Sunray, TX, and Etter, TX, will be priced \$600 per car below Hereford (widened from the current spread of \$400 per car below Hereford).

Because the PNW and the Texas panhandle are the two largest destinations for corn on the BNSF network, the PNW-Hereford tariff rate spreads are a key metric used to understand corn flows. Because tariff rates from all origins to Hereford and the U.S.-Mexico border are identical this year, [figure 1](#) shows the PNW-Mexico tariff rate spread as well as the PNW-Hereford spread.

Because BNSF raised all rates to the PNW by \$200 per car and raised most rates to Hereford by \$200 per car, most origins will see no change to the PNW-Hereford tariff rate spread. One-hundred-one origins (mostly in North Dakota, South Dakota, and Minnesota) will have a negative PNW-Hereford tariff rate spread (i.e., PNW rate is lower), and 65 origins (mostly in Illinois, Iowa, and Nebraska) will have a positive PNW-Hereford tariff rate spread (i.e., Hereford rate is lower). Beginning this year, Mitchell, SD, will have the same rate to both destinations.

UP Rate Adjustments. Matching UP's rate increase for soybeans (that went into effect in September—see [GTR, August 20, 2026](#)), the firm will raise its corn tariff rates by [\\$225 per car](#) beginning in October.

The overall competitive landscape between UP and BNSF will not significantly change this year, because most of BNSF's rates are set to rise by \$200 per car and all of UP's rates are set to rise by \$225 per car. However, for corn shipments from Illinois to Mexico, BNSF's \$200 rate cut may pull volumes from UP.

For example, in October, UP will charge a \$5,778 freight rate (tariff plus fuel surcharge) from Sterling, IL, to Eagle Pass, TX. BNSF will charge \$5,331 from nearby Polo, IL, to El Paso, TX—\$447 per car less than UP's rate from Sterling. Last October, BNSF's price advantage was just \$113 per car. Similarly, UP's freight rate from Pontiac, IL, to the U.S.-Mexico border is \$399 above BNSF's freight rate from nearby Ransom, IL, to the U.S.-Mexico border. Last October, the two rates were just \$46 apart. Bartlett recently opened a new elevator—near Sheffield, IL—on UP's line ([GTR, September 3, 2026, third highlight](#)). This elevator has the same tariff rate as Sterling, IL.

Besides tariff rates, secondary market values for shuttle trains (and BNSF's direct domestic efficiency trains) are another factor that affects the competitiveness between UP and BNSF. For October deliveries, UP shuttles are currently averaging \$600 per car less than BNSF shuttles ([GTR fig. 7](#)).

CPKC and CN Rate Adjustments. Like UP, CPKC will raise its corn tariff rates, across origins, by \$225 per car. This rise slightly exceeds the railroad's \$200 increase for soybean tariff rates.

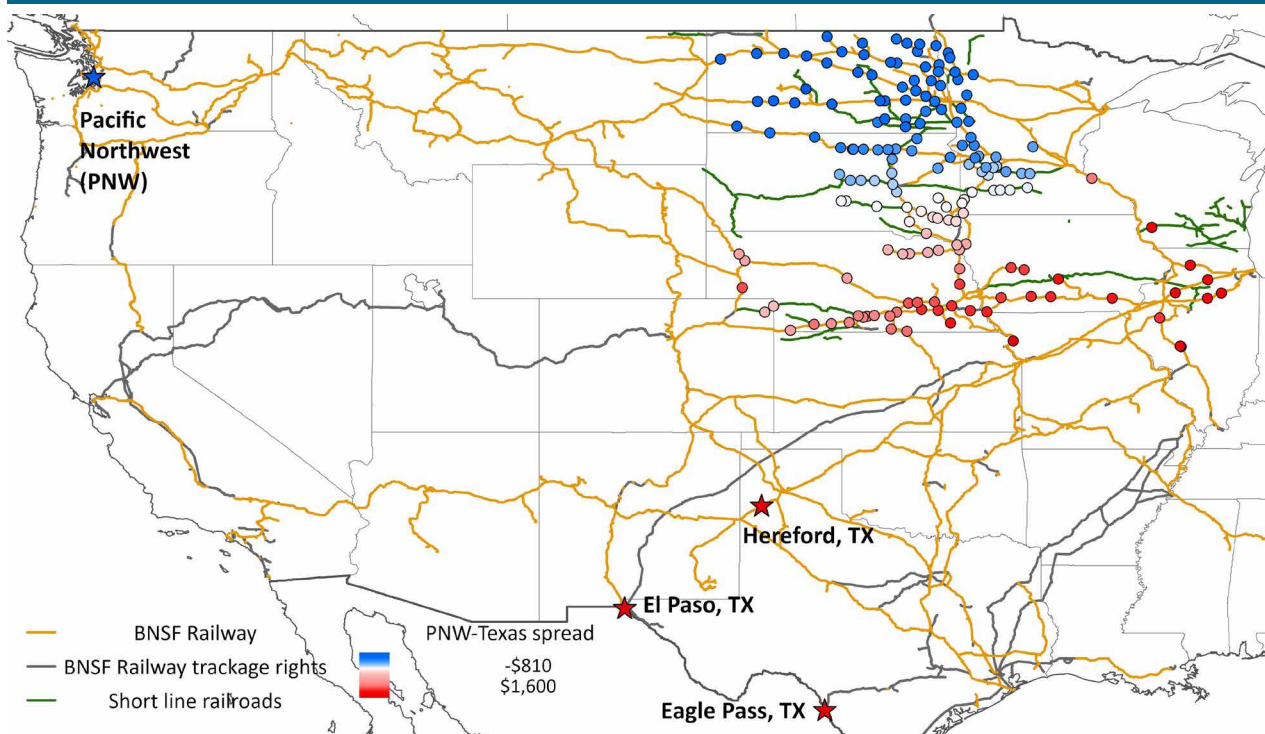
Canadian National Railway's (CN) tariff rates are the same for corn and soybean shipments from elevators in the Corn Belt to Louisiana Gulf export terminals. In September, these rates rose by \$275 per car. Beginning in October, the same rates will rise another \$330 per car. That increase will remain in effect until December 1 when these CN rates will fall \$220 per car and not change again for the rest of the marketing year. Because CN's mainline runs parallel to the Mississippi River, its tariff rates closely follow barge rates—which are currently above average ([GTR table 9](#)).

MY 2026/27 Projections: Corn Crop May Be Second Largest on Record

As farmers begin harvesting this year's corn crop, USDA projects a smaller corn crop than last year—but the second largest on record, if realized. Likewise, corn demand is projected to fall from last year, but is expected to remain robust. Railroads have staged equipment to meet that demand during this year's harvest ([GTR, September 3, 2026](#)).

Strong Corn Production—Weaker in the West. According to USDA's September [Crop Production report](#), U.S. farmers are projected to harvest 15.8 bbu of corn in MY 2026/27. If realized, this volume would be 7 percent below

Figure 1. BNSF Railway's corn tariff rate spread (for all origins shown) between Pacific Northwest export terminals and Texas destinations, 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 [39011](#) and [39013-M](#).

last year's record crop, but up 4 percent from average. Also, if realized, Iowa's projected 2.8-bbu corn harvest would be 1 percent more than last year and 8 percent above average.

This year, production is not expected to rise in the western Corn Belt—which will likely reduce the demand for rail transportation from last year. Nebraska farmers are projected to harvest 1.7 bbu of corn this fall. If realized, this total would be 16 percent below last year and 4

percent below average. USDA also projects production declines from last year in Kansas, North Dakota, and South Dakota—though production is still expected to be above average.

Corn Demand To Remain Above Average. USDA's September [World Agricultural Supply and Demand Estimates report](#) projects U.S. corn exports for MY 2026/27 will total 3.3 bbu—down 4 percent from MY 2025/26, but up 29 percent from average. Domestic corn use for

MY 2026/27 is projected at 12.9 bbu—down 3 percent from MY 2025/26, but up 3 percent from average. If these totals are realized, exports and domestic use would each be the second largest on record for their respective categories.

USDA's Foreign Agricultural Service reports that, as of September 10, total commitments for MY 2026/27 corn exports reached 17.40 million metric tons (mmt)—or 685 mbu ([GTR table 15](#)). This total is up less than 1 percent from average. Also as of September 10, total commitments for MY 2026/27 corn exports to Mexico, the largest buyer of U.S.

corn, totaled 6.65 mmt—or 262 mbu—6 percent above average for the same period. Ukrainian corn exports are obstructed by [Russian attacks on Ukrainian export terminals](#) in the Black Sea. If these logistical challenges persist, the demand for U.S. corn exports may rise.

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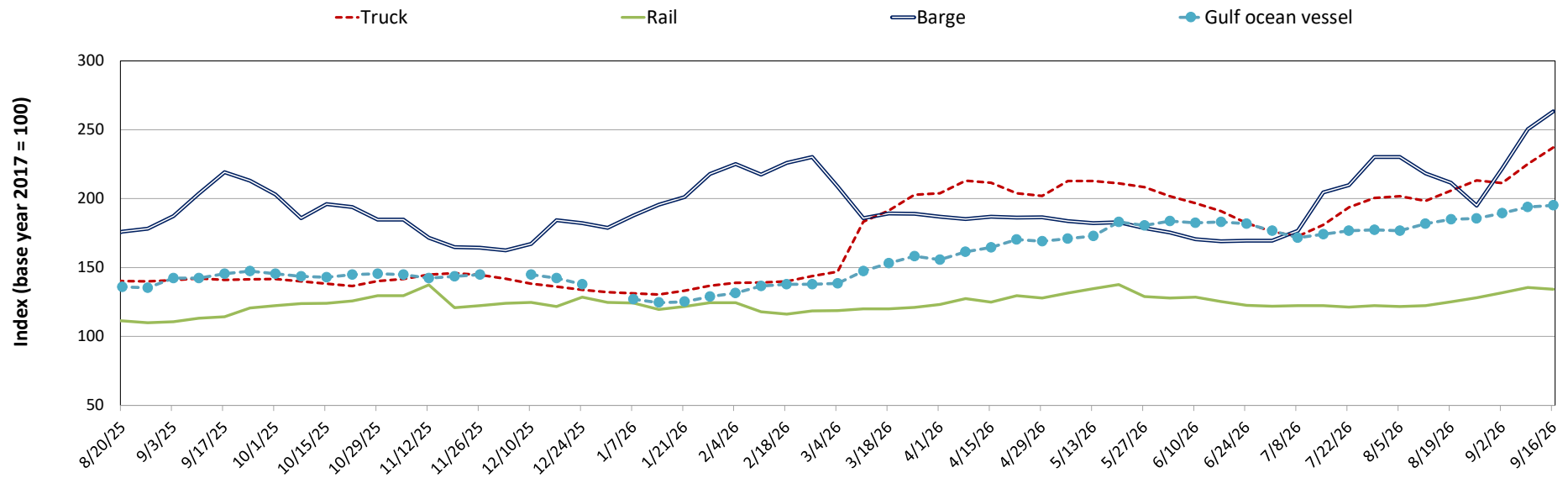
Grains are transported to the domestic and international markets via one or more of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
09/16/26	237	134	263	195	179
09/09/26	225	136	250	194	178
09/17/25	141	114	219	146	141

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.

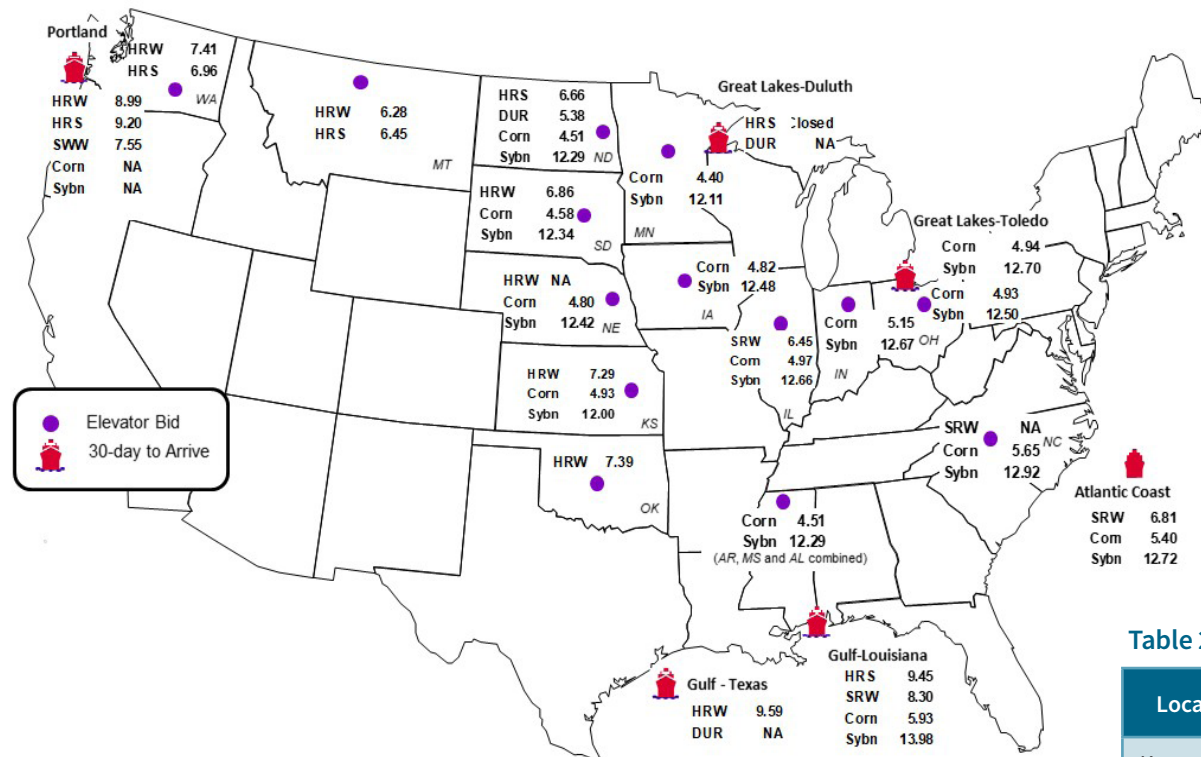
Figure 1. Grain transportation cost indicators as of week ending 09/16/26



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	9/11/2026	9/4/2026
Corn	IL-Gulf	-0.96	-1.11
Corn	NE-Gulf	-1.13	-1.31
Soybean	IA-Gulf	-1.50	-1.31
HRW	KS-Gulf	-2.30	-1.99
HRS	ND-Portland	-2.54	-2.34

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	09/11/2026	Week ago 09/04/2026	Year ago 09/12/2025
Kansas City	Wht	Dec	7.984	8.024	5.146
Minneapolis	Wht	Dec	7.450	7.450	5.718
Chicago	Wht	Dec	7.254	7.340	5.234
Chicago	Corn	Dec	5.302	5.366	4.298
Chicago	Sybn	Dec	12.964	13.096	10.462

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

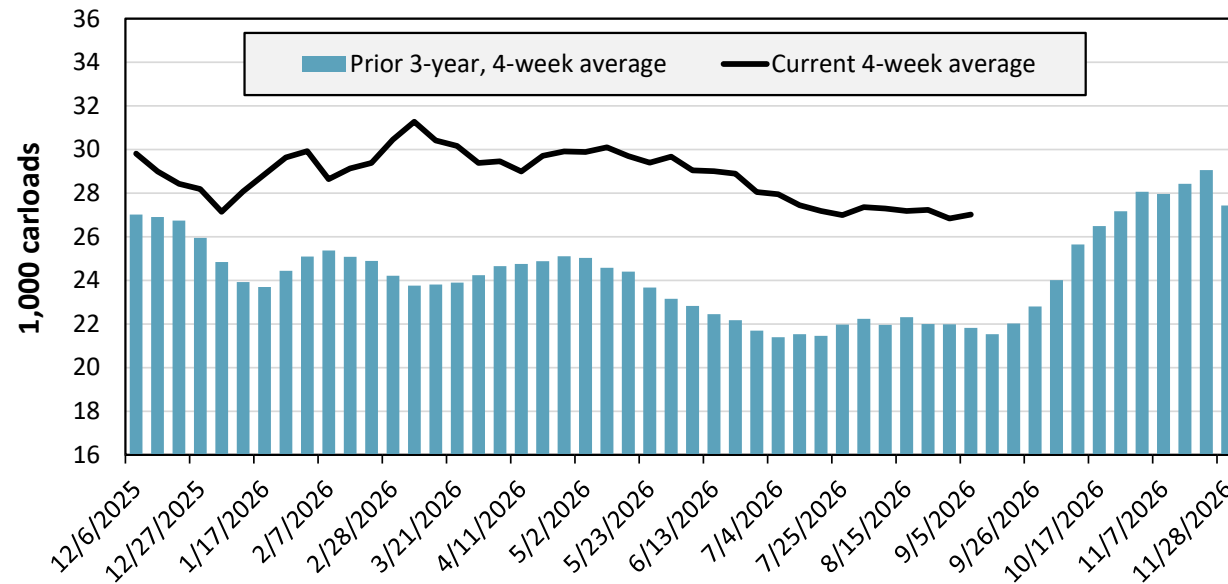
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 9/05/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,130	2,425	13,048	5,906	3,276	1,660	27,445
This week last year	972	2,226	9,940	4,929	2,711	1,423	22,201
2026 YTD	52,118	90,567	448,857	233,938	125,753	59,587	1,010,820
2025 YTD	54,910	98,450	394,495	206,398	99,312	50,395	903,960
2026 YTD as % of 2025 YTD	95	92	114	113	127	118	112
Last 4 weeks as % of 2025	117	105	114	105	118	120	112
Last 4 weeks as % of 3-yr. avg.	97	100	130	118	135	153	124
Total 2025	81,717	140,116	608,958	313,968	157,757	79,502	1,382,018

Note: The last 4-week percentages compare the most recent 4 weeks of data to the analogous 4 weeks from the prior year and to the analogous 4 weeks in the prior 3 years. CSX = CSX Transportation; NS = Norfolk Southern; BNSF = BNSF; Railway UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City; YTD = year-to-date; avg. = average; yr. = year. CPKC and CN report carloads for their U.S.-operations only, so the U.S. total reflects originated carloads for all six Class I railroads.

Source: Surface Transportation Board.

Figure 3. Total weekly U.S. Class I railroad grain carloads



For the 4 weeks ending September 5, grain carloads were up 1 percent from the previous week, up 12 percent from last year, and up 24 percent from the 3-year average.

Source: Surface Transportation Board.

Table 4a. Rail service metrics—grain unit train origin dwell times and train speeds

For the week ending: 9/4/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	54.0	40.3	23.7	24.1	7.9	33.7	30.6
	Average over last 4 weeks	34.2	37.3	28.1	23.5	10.3	26.1	26.6
	Average of same 4 weeks last year	20.0	23.5	11.8	14.0	8.1	40.8	19.7
Average grain unit train speeds (miles per hour)	This week	22.1	19.0	23.5	22.5	22.7	17.9	21.3
	Average over last 4 weeks	21.7	18.1	23.6	22.4	22.8	17.9	21.1
	Average of same 4 weeks last year	23.3	19.4	24.5	23.1	24.1	13.7	21.3

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

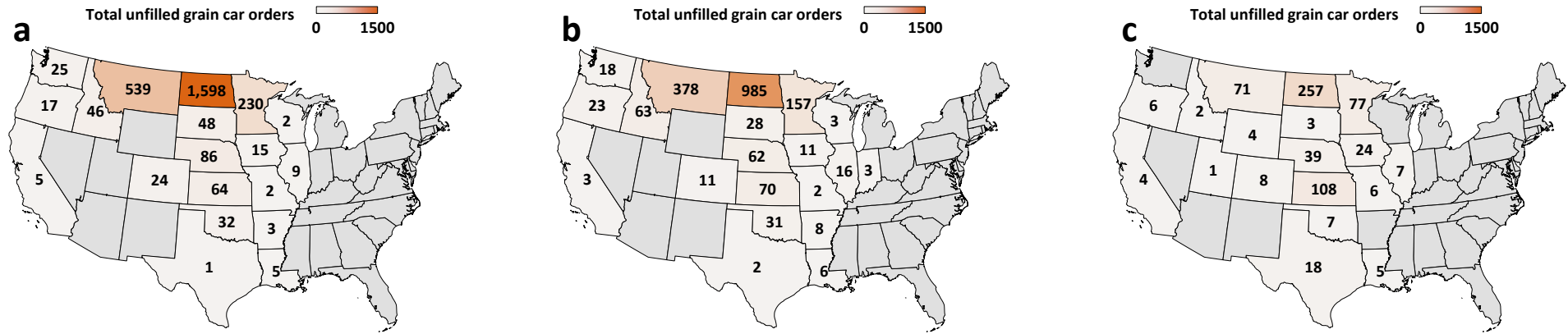
For the week ending: 9/4/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	34	18	357	47	2	170	628
	Average over last 4 weeks	48	20	332	56	8	167	631
	Average of same 4 weeks last year	12	5	238	64	8	316	642
Average number of loaded grain cars not moved in over 48 hours	This week	66	415	506	74	5	193	1,259
	Average over last 4 weeks	58	285	783	63	9	265	1,462
	Average of same 4 weeks last year	24	155	287	68	7	561	1,102
Average number of grain unit trains held	This week	0	0	5	5	0	6	16
	Average over last 4 weeks	0	0	5	5	0	6	17
	Average of same 4 weeks last year	0	0	2	3	0	11	16
Total unfilled manifest grain car orders	This week	0	1	1,362	186	0	1,202	2,751
	Average over last 4 weeks	5	0	971	206	0	696	1,878
	Average of same 4 weeks last year	1	4	169	199	0	356	729

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](#).

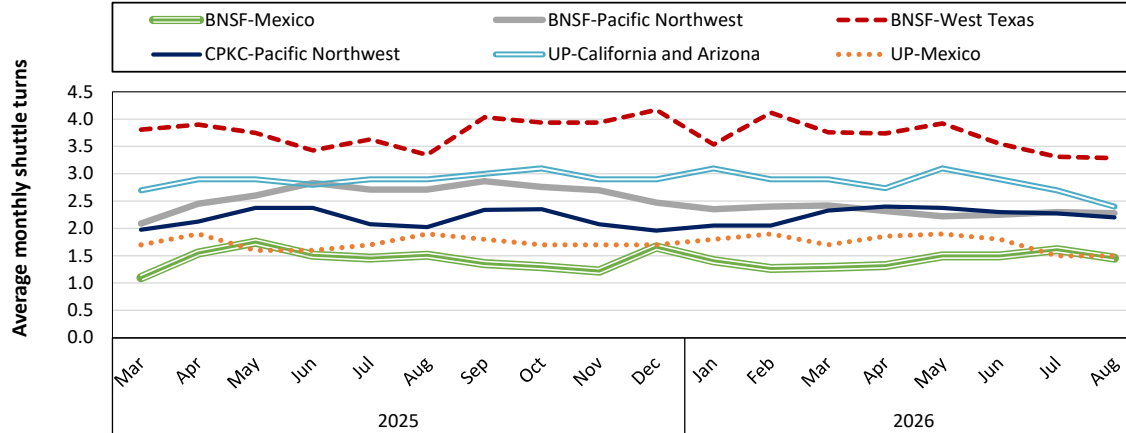
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 9/4/2026 (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

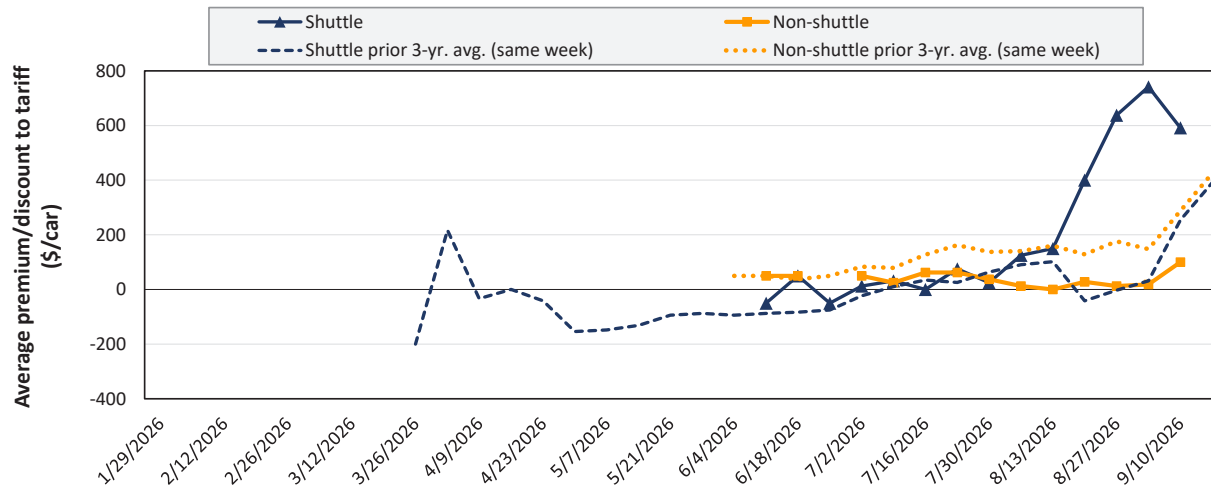


In August 2026, BNSF Railway's average monthly grain shuttle turns were 1.5 to Mexico, 2.3 to the Pacific Northwest, and 3.3 to West Texas. CPKC's shuttle turns averaged 2.2 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.4 to California and Arizona, and they averaged 1.5 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.org/). 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 September 2026



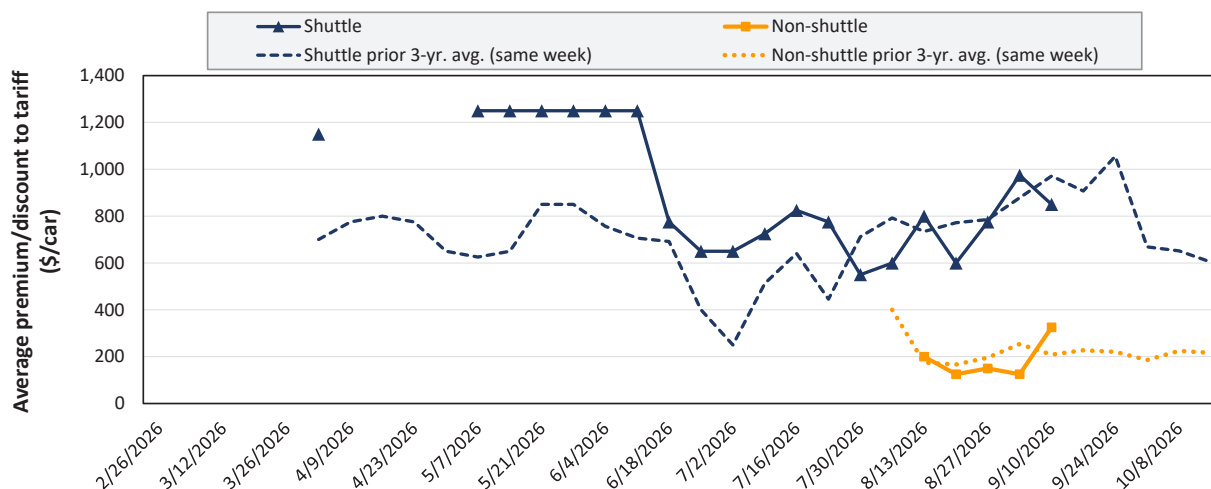
Average non-shuttle bids/offers rose \$81 this week, and are at the peak.

Average shuttle bids/offers fell \$150 this week and are \$150 below the peak.

9/10/2026	BNSF	UP
Non-Shuttle	\$100	n/a
Shuttle	\$733	\$450

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 October 2026



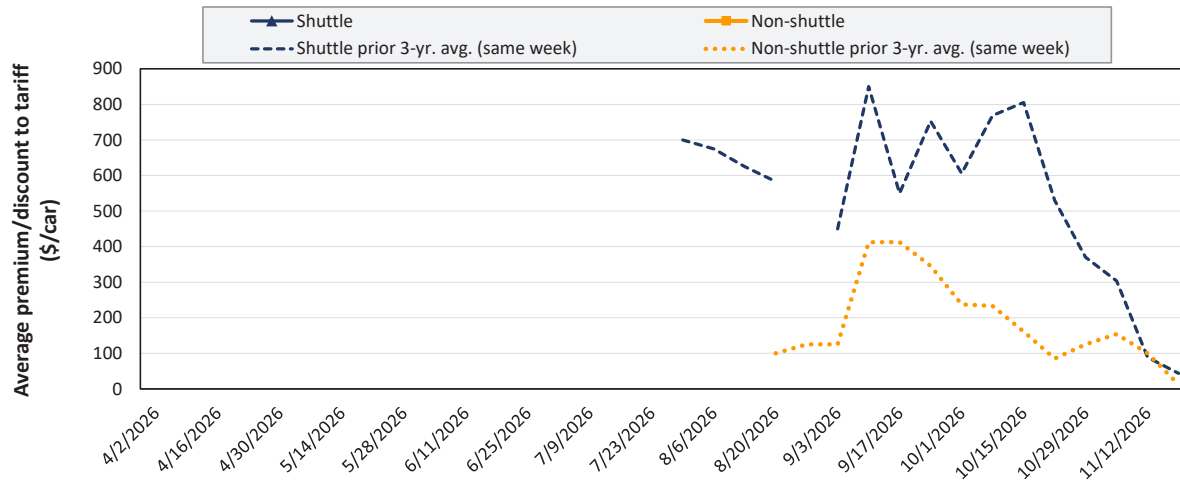
Average non-shuttle bids/offers rose \$200 this week, and are at the peak.

Average shuttle bids/offers fell \$125 this week and are \$400 below the peak.

9/10/2026	BNSF	UP
Non-Shuttle	\$500	\$150
Shuttle	\$1,150	\$550

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 November 2026



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

There were no shuttle bids/offers this week.

9/10/2026	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	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. 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: 9/10/2026		Delivery period					
		Sep-26	Oct-26	Nov-26	Dec-26	Jan-27	Feb-27
Non-shuttle	BNSF	100	500	n/a	n/a	n/a	n/a
	Change from last week	75	450	n/a	n/a	n/a	n/a
	Change from same week 2025	25	375	n/a	n/a	n/a	n/a
	UP	n/a	150	n/a	n/a	n/a	n/a
	Change from last week	n/a	-50	n/a	n/a	n/a	n/a
	Change from same week 2025	n/a	75	n/a	n/a	n/a	n/a
Shuttle	BNSF	733	1,150	n/a	n/a	n/a	n/a
	Change from last week	0	-150	n/a	n/a	n/a	n/a
	Change from same week 2025	758	681	n/a	n/a	n/a	n/a
	UP	450	550	n/a	n/a	n/a	n/a
	Change from last week	-300	-100	n/a	n/a	n/a	n/a
	Change from same week 2025	367	250	n/a	n/a	n/a	n/a
	CPKC	500	500	n/a	n/a	n/a	n/a
	Change from last week	0	200	n/a	n/a	n/a	n/a
	Change from same week 2025	n/a	400	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, September 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	\$5,984	\$432	\$6,416	\$1.73	\$63.71	7.6
	BNSF	Williston, ND	Superior, WI	Shuttle	\$4,466	\$216	\$4,682	\$1.27	\$46.49	7.4
	CPKC	Westby, MT	St. Louis, MO	Unit	\$6,013	\$1,056	\$7,069	\$1.91	\$70.20	12.4
	UP	Yuma, AZ	Houston, TX	Manifest	\$6,025	\$796	\$6,821	\$1.84	\$67.74	5.1
Hard red spring (HRS)	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	\$5,029	\$250	\$5,279	\$1.43	\$52.43	8.1
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	\$6,365	\$602	\$6,967	\$1.88	\$69.18	9.2
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	\$3,040	\$116	\$3,156	\$0.85	\$31.34	8.9
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	\$5,882	\$626	\$6,508	\$1.76	\$64.63	10.3
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	\$5,963	\$530	\$6,493	\$1.75	\$64.48	8.6
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	\$5,562	\$440	\$6,002	\$1.62	\$59.60	8.6
	CPKC	Minot, ND	Kalama, WA	Unit	\$5,448	\$935	\$6,383	\$1.73	\$63.39	11.2
	CPKC	Nekoma, ND	Chicago, IL	Manifest	\$5,255	\$562	\$5,817	\$1.57	\$57.76	9.8
Hard red winter (HRW)	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	\$3,400	\$228	\$3,628	\$0.98	\$36.02	4.5
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	\$3,400	\$279	\$3,679	\$0.99	\$36.53	0.5
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	\$5,800	\$752	\$6,552	\$1.77	\$65.06	9.0
	BNSF	Garden City, KS	San Bernardino, CA	DET	\$5,600	\$529	\$6,129	\$1.66	\$60.86	4.7
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,200	\$385	\$4,585	\$1.24	\$45.53	6.8
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,000	\$398	\$4,398	\$1.19	\$43.67	7.7
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	\$3,500	\$328	\$3,828	\$1.03	\$38.01	6.5
	BNSF	Wichita, KS	Chicago, IL	DET	\$3,700	\$223	\$3,923	\$1.06	\$38.96	4.1
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	\$3,900	\$356	\$4,256	\$1.15	\$42.27	7.2
	UP	Byers, CO	Houston, TX	Shuttle	\$4,525	\$675	\$5,200	\$1.41	\$51.63	5.7
	UP	Goodland, KS	Kansas City, MO	Manifest	\$5,067	\$252	\$5,319	\$1.44	\$52.82	4.0
	UP	Medford, OK	Houston, TX	Shuttle	\$3,775	\$333	\$4,108	\$1.11	\$40.79	3.5
	UP	Salina, KS	Houston, TX	Shuttle	\$4,025	\$444	\$4,469	\$1.21	\$44.38	4.3
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	\$4,964	\$270	\$5,234	\$1.41	\$51.98	7.3
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	\$4,589	\$341	\$4,930	\$1.33	\$48.96	9.0
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	\$2,082	\$168	\$2,250	\$0.61	\$22.34	8.8
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	\$8,611	\$251	\$8,862	\$2.40	\$88.01	6.2
	CSX	Chicago, IL	Albany, NY	Unit	\$7,676	\$251	\$7,927	\$2.14	\$78.72	6.9
	CSX	Chicago, IL	Buffalo, NY	Manifest	\$6,102	\$161	\$6,263	\$1.69	\$62.19	5.7
	CSX	Chicago, IL	Indiantown, FL	Manifest	\$8,832	\$429	\$9,261	\$2.50	\$91.96	8.1

Note: Chicago, IL, serves as an interchange point between eastern and western Class I railroads. In the table above, all routes with Chicago as either an origin or destination are subject to “[Rule 11](#)”—meaning their rate must be combined with a tariff rate from another railroad. (For example, rates for Wichita, KS, to Albany, NY, would combine Wichita to Chicago and Chicago to Albany.) All rates (except Goodland, KS, to Kansas City, MO) are for railroad-owned, large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). The Goodland-to-Kansas City route is for small covered hoppers (C-113), which each carry 100 short tons (90.7 metric tons). A bushel of wheat weighs 60 pounds. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge. DET = Domestic Efficiency Trains. DET trains—on BNSF Railway (BNSF) only—are composed of 110 cars loaded at a single origin and split en route to multiple destinations. For mileage calculations, BNSF uses “Seattle, WA” for all Pacific Northwest (PNW) locations and “Houston, TX” for all Texas Gulf locations. CPKC = Canadian Pacific Kansas City. CSX = CSX Transportation. UP = Union Pacific Railroad. A larger dataset (with additional routes, calculations, and shipment characteristics) is available on [AgTransport](#).

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

Table 7. Rail tariff rates for corn and soybean unit/shuttle train shipments, September 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	\$390	\$5,990	\$1.51	\$59.48	1.2
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	\$5,470	\$670	\$6,140	\$1.55	\$60.97	8.6
	BNSF	Edison, NE	Hanford, CA	Railroad	\$5,460	\$645	\$6,105	\$1.54	\$60.63	-1.5
	BNSF	Edison, NE	Hereford, TX	Railroad	\$4,500	\$275	\$4,775	\$1.20	\$47.42	-6.7
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	\$5,350	\$740	\$6,090	\$1.54	\$60.48	9.9
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	\$4,620	\$329	\$4,949	\$1.25	\$49.15	6.1
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	\$4,260	\$269	\$4,529	\$1.14	\$44.97	-7.3
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	\$4,000	\$414	\$4,414	\$1.11	\$43.83	-4.9
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	\$5,430	\$583	\$6,013	\$1.52	\$59.71	7.6
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	\$5,430	\$660	\$6,090	\$1.54	\$60.48	8.5
	CN	Gibson City, IL	Reserve, LA	Private	\$2,411	\$605	\$3,016	\$0.76	\$29.95	19.2
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,791	\$605	\$3,396	\$0.86	\$33.72	16.7
	CPKC	Delhi, LA	Morton, MS	Railroad	\$1,342	\$84	\$1,426	\$0.36	\$14.17	2.5
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,047	\$1,075	\$6,122	\$1.54	\$60.80	10.2
	CPKC	Glenwood, MN	Boardman, OR	Railroad	\$5,513	\$1,035	\$6,548	\$1.65	\$65.02	9.1
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	\$6,241	\$219	\$6,460	\$1.63	\$64.16	8.4
	CSX	Marysville, OH	Rose Hill, NC	Railroad	\$6,378	\$242	\$6,620	\$1.67	\$65.74	7.8
	CSX	Olney, IL	Fairmount, GA	Railroad	\$4,891	\$155	\$5,046	\$1.27	\$50.11	7.2
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	\$3,935	\$401	\$4,336	\$1.09	\$43.06	0.4
	UP	Frankfort, KS	Calipatria, CA	Railroad	\$5,855	\$912	\$6,767	\$1.71	\$67.20	3.5
Soybeans	UP	Mead, NE	Keyes, CA	Railroad	\$6,015	\$1,007	\$7,022	\$1.77	\$69.74	4.0
	UP	Nebraska City, NE	Amarillo, TX	Railroad	\$4,855	\$414	\$5,269	\$1.33	\$52.32	0.4
	UP	Sloan, IA	Burley, ID	Railroad	\$5,535	\$682	\$6,217	\$1.57	\$61.74	2.2
	UP	Sterling, IL	Nashville, AR	Railroad	\$4,075	\$419	\$4,494	\$1.13	\$44.63	0.5
	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	\$6,255	\$611	\$6,866	\$1.86	\$68.18	8.9
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	\$5,185	\$582	\$5,767	\$1.56	\$57.27	7.5
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	\$6,205	\$592	\$6,797	\$1.84	\$67.50	8.8
	BNSF	Casselton, ND	St. Louis, MO	Railroad	\$3,400	\$311	\$3,711	\$1.00	\$36.85	6.2
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	\$6,305	\$655	\$6,960	\$1.88	\$69.11	9.4
	CN	Gibson City, IL	Reserve, LA	Private	\$2,411	\$605	\$3,016	\$0.82	\$29.95	19.2
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,791	\$605	\$3,396	\$0.92	\$33.72	16.7
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,785	\$1,075	\$6,860	\$1.85	\$68.13	9.0
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	\$3,526	\$813	\$4,339	\$1.17	\$43.08	10.8
	CSX	Casey, IL	Mobile, AL	Private	\$3,646	\$241	\$3,887	\$1.05	\$38.60	6.6
	CSX	Marion, OH	Chesapeake, VA	Private	\$3,214	\$236	\$3,450	\$0.93	\$34.26	7.3
	UP	Canton, KS	Houston, TX	Railroad	\$3,875	\$433	\$4,308	\$1.16	\$42.78	10.4
	UP	Cozad, NE	Kalama, WA	Railroad	\$5,365	\$906	\$6,271	\$1.69	\$62.27	10.6
	UP	Cozad, NE	Houston, TX	Railroad	\$4,235	\$625	\$4,860	\$1.31	\$48.26	11.1
	UP	Sloan, IA	Ama, LA	Railroad	\$4,315	\$714	\$5,029	\$1.36	\$49.94	11.5

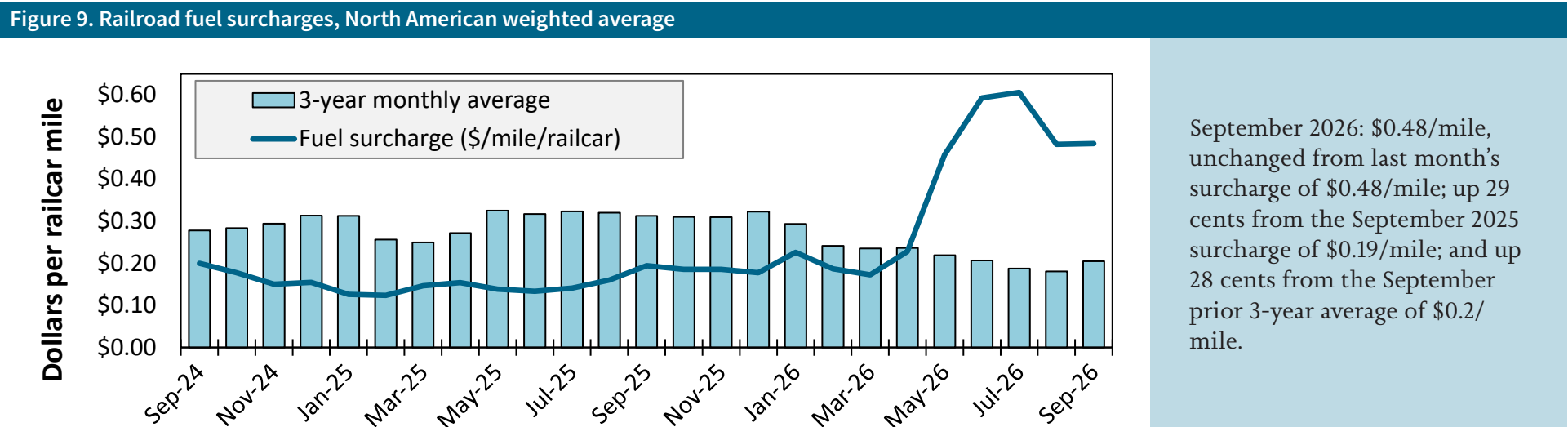
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage 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, September 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	\$449	\$5,090	\$1.27	\$50.10	8.3
	BNSF	Superior, NE	El Paso, TX	Shuttle	\$4,622	\$353	\$4,975	\$1.24	\$48.96	-2.7
	CPKC	Atchison, KS	Laredo, TX	Non-shuttle	\$5,080	\$912	\$5,992	\$1.50	\$58.97	6.9
	CPKC	Council Bluffs, IA	Laredo, TX	Non-shuttle	\$5,550	\$1,010	\$6,560	\$1.64	\$64.56	7.0
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$871	\$5,876	\$1.47	\$57.83	6.7
	CPKC	Marshall, MO	Laredo, TX	Non-shuttle	\$5,190	\$924	\$6,114	\$1.53	\$60.17	6.8
	UP	Pontiac, IL	Eagle Pass, TX	Shuttle	\$4,535	\$741	\$5,276	\$1.32	\$51.93	3.1
Soybeans	UP	Sterling, IL	Eagle Pass, TX	Shuttle	\$4,655	\$769	\$5,424	\$1.36	\$53.38	3.2
	BNSF	Brunswick, MO	El Paso, TX	Shuttle	\$3,585	\$381	\$3,966	\$1.06	\$39.03	-10.8
	BNSF	Hardin, MO	Eagle Pass, TX	Shuttle	\$3,585	\$379	\$3,964	\$1.06	\$39.01	-10.8
	CPKC	Atchison, KS	Laredo, TX	Non-shuttle	\$5,080	\$912	\$5,992	\$1.60	\$58.97	6.9
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$871	\$5,876	\$1.57	\$57.83	6.7
	UP	Grand Island, NE	Eagle Pass, TX	Shuttle	\$5,175	\$705	\$5,880	\$1.57	\$57.87	9.6
	UP	Roelyn, IA	Eagle Pass, TX	Shuttle	\$5,260	\$738	\$5,998	\$1.61	\$59.03	9.7
Wheat	BNSF	FT Worth, TX	El Paso, TX	DET	\$3,100	\$275	\$3,375	\$0.90	\$33.22	9.4
	BNSF	FT Worth, TX	El Paso, TX	Shuttle	\$2,600	\$275	\$2,875	\$0.77	\$28.30	-0.4
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$871	\$5,876	\$1.57	\$57.83	6.7
	UP	Great Bend, KS	Laredo, TX	Shuttle	\$4,325	\$529	\$4,854	\$1.30	\$47.77	4.7
	UP	Wichita, KS	Laredo, TX	Shuttle	\$4,065	\$466	\$4,531	\$1.21	\$44.59	4.4

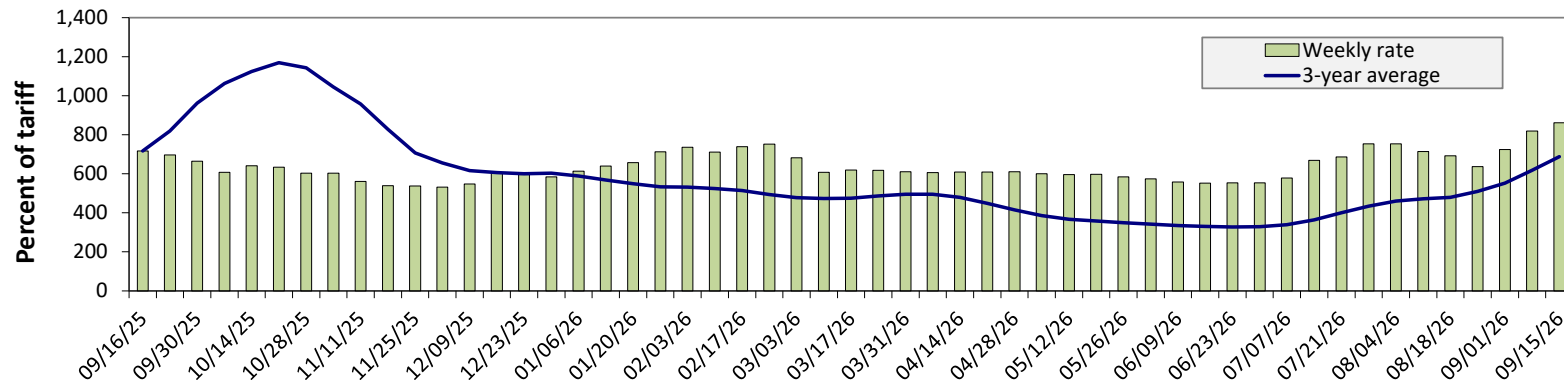
Note: After December 2021, U.S. railroads stopped reporting "through rates" from the U.S. origin to the Mexican destination. Thus, the table shows "Rule 11 rates," which cover only the portion of the shipment from a U.S. origin to locations on the U.S.-Mexico border. The Rule 11 rates apply only to shipments 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).



September 2026: \$0.48/mile, unchanged from last month's surcharge of \$0.48/mile; up 29 cents from the September 2025 surcharge of \$0.19/mile; and up 28 cents from the September prior 3-year average of \$0.2/ 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 September 15: 5 percent higher than the previous week; 20 percent higher than last year; and 25 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	9/15/2026	878	919	861	818	869	847
	9/8/2026	839	850	819	792	821	856
\$/ton	9/15/2026	54.35	48.89	39.95	32.64	40.76	26.60
	9/8/2026	51.93	45.22	38.00	31.60	38.50	26.88
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	29	20	33	29	41
	3-year avg.	27	33	25	23	27	18
Rate	October	988	984	942	860	925	808
	December	n/a	742	689	595	631	539

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](#).

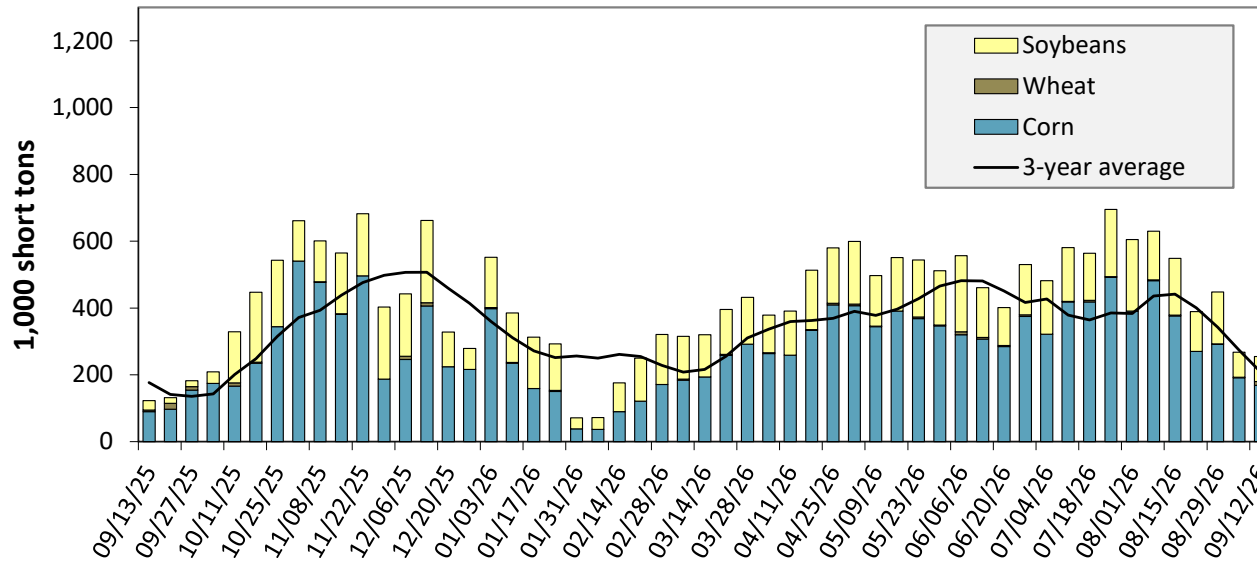
Source: USDA, Agricultural Marketing Service.

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 September 12: 107 percent higher than last year and 22 percent higher than the 3-year average.

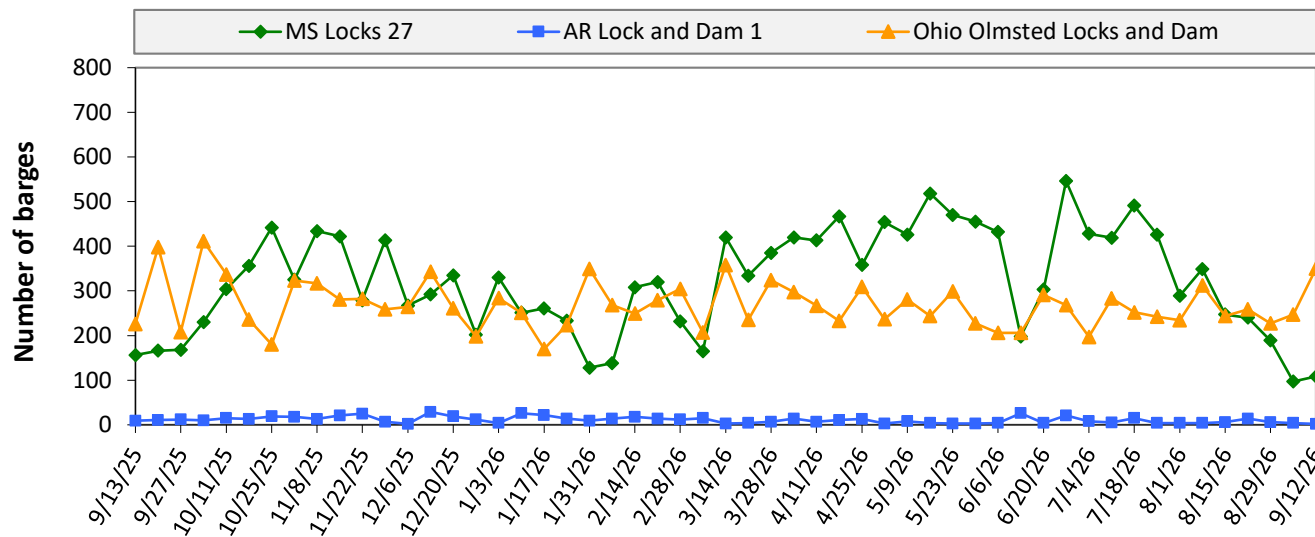
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 09/12/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	58	0	24	0	82
Mississippi River (Winfield, MO (L25))	116	11	56	0	184
Mississippi River (Alton, IL (L26))	143	11	72	5	231
Mississippi River (Granite City, IL (L27))	169	11	75	5	261
Illinois River (La Grange)	16	0	17	0	33
Ohio River (Olmsted)	67	4	73	0	143
Arkansas River (L1)	8	3	21	0	32
Weekly total - 2026	244	17	169	5	436
Weekly total - 2025	166	24	60	2	252
2026 YTD	12,719	688	7,230	74	20,712
2025 YTD	14,184	1,016	7,675	133	23,008
2026 as % of 2025 YTD	90	68	94	55	90
Last 4 weeks as % of 2025	135	34	128	144	122
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.

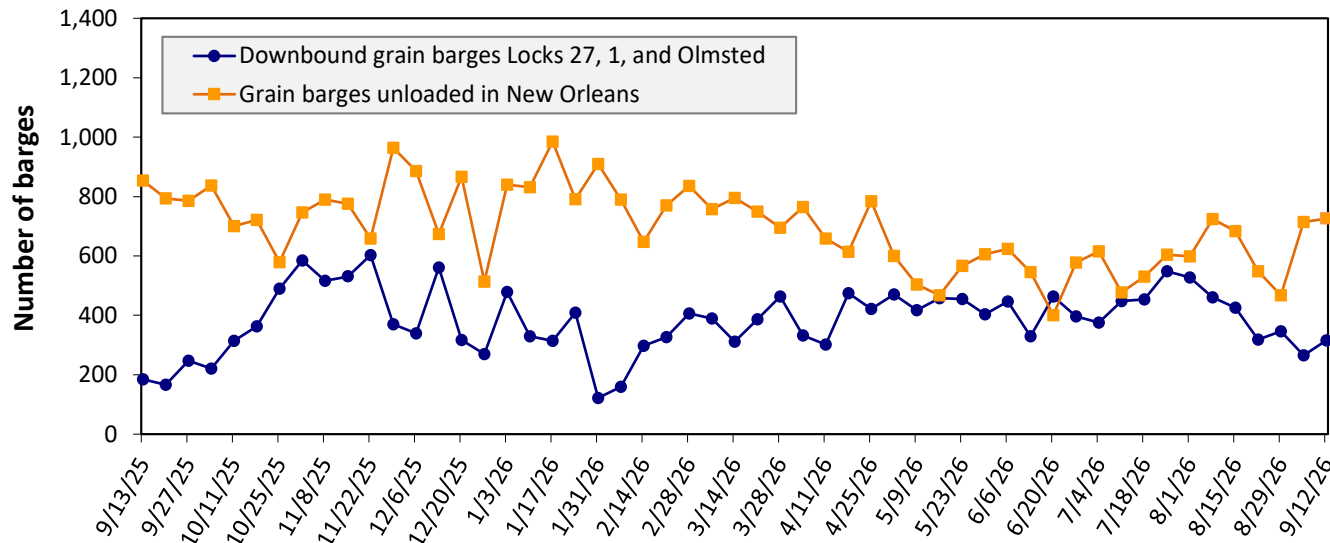
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending September 12: 460 barges transited the locks, 112 barges more than the previous week, and 22 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 September 12: 315 barges moved down river, 50 more than the previous week; 726 grain barges unloaded in the New Orleans Region, 2 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	
		September 2026	August 2026	September 2025	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$24.73	\$24.76	\$23.18	6.7	11.4
	Central Ferry, WA/Almota, WA	\$23.77	\$23.80	\$22.25	6.8	11.6
	Lyons Ferry, WA	\$22.68	\$22.71	\$21.20	7.0	11.8
	Windust, WA/Lower Monumental, WA	\$21.57	\$21.60	\$20.13	7.2	12.0
	Sheffler, WA	\$21.54	\$21.57	\$20.10	7.2	12.0
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$20.26	\$20.29	\$18.86	7.4	12.4
	Port Kelly, WA/Wallula, WA	\$20.02	\$20.05	\$18.63	7.5	12.4
	Umatilla, OR	\$19.92	\$19.95	\$18.53	7.5	12.5
	Boardman, OR/Hogue Warner, OR	\$19.64	\$19.67	\$18.26	7.6	12.5
	Arlington, OR/Roosevelt, WA	\$19.47	\$19.50	\$18.10	7.6	12.6
	Biggs, OR	\$18.04	\$18.07	\$16.72	7.9	13.0
	The Dalles, OR	\$16.86	\$16.89	\$15.58	8.2	13.4

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

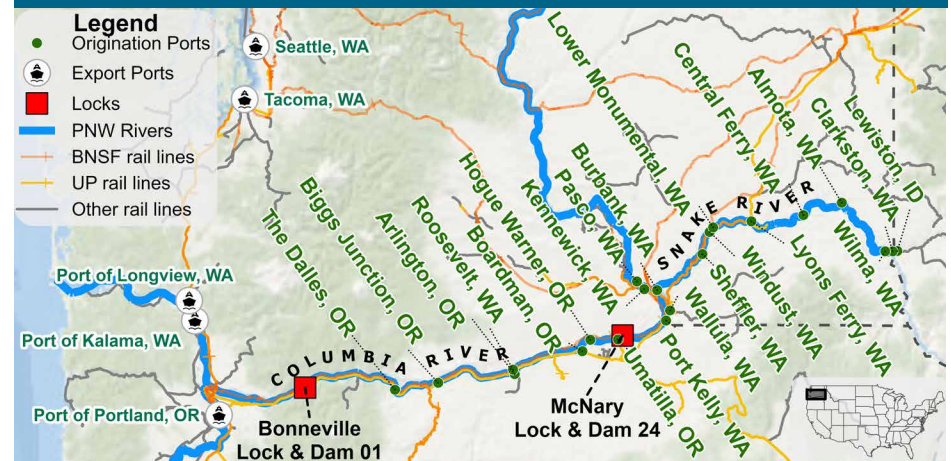
Table 12. Monthly barged grain movements, Columbia-Snake (1,000 tons)

August, 2026	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	389	0	389
Columbia River (Bonneville Lock and Dam (L1))	450	0	450
Monthly total 2025 (L1)	421	0	421
Monthly total 2025(L24)	353	0	353
2026 YTD(L1)	2,334	0	2,334
2026 YTD(L24)	1,897	0	1,897
2025 YTD(L1)	2,629	0	2,629
2025 YTD(L24)	2,297	0	2,297

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.

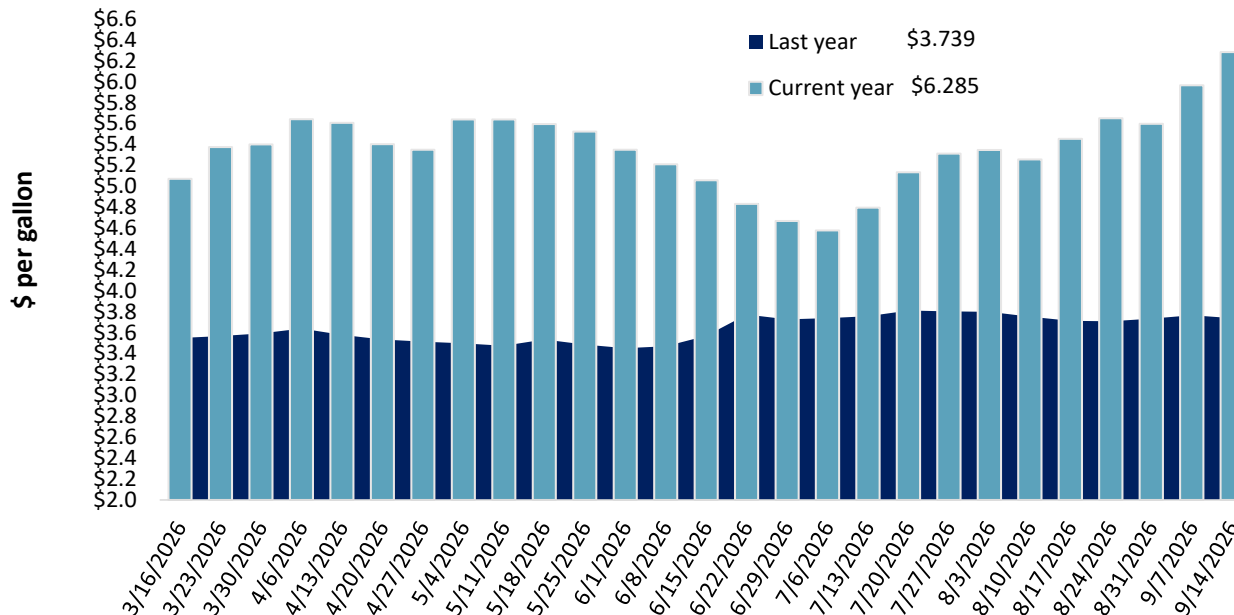
Table 13. Retail on-highway diesel prices, week ending 9/14/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	6.158	0.414	2.410
	New England	6.202	0.212	2.241
	Central Atlantic	6.312	0.261	2.392
	Lower Atlantic	6.096	0.491	2.433
II	Midwest	6.250	0.304	2.540
III	Gulf Coast	6.027	0.273	2.638
IV	Rocky Mountain	6.066	0.261	2.344
V	West Coast	7.250	0.263	2.727
	West Coast less California	6.566	0.252	2.432
	California	8.039	0.275	3.068
Total	United States	6.285	0.318	2.546

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 September 14, the U.S. average diesel fuel price increased 31.8 cents from the previous week to \$6.285 per gallon, 254.6 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 09/10/2026	470	406	1,090	1,173	58	3,198	14,941	19,828	37,967
	This week year ago	2,275	651	1,311	1,135	104	5,477	21,590	9,207	36,273
	Last 4 wks. as % of same period in prior marketing year	25	74	88	111	69	64	42	112	63
Current shipped (cummulative) export sales	Current MYTD	1,506	964	1,599	1,651	182	5,903	2,459	803	9,165
	Prior MYTD	3,036	1,192	1,948	1,329	118	7,624	2,243	1,002	10,868
	Current MYTD as % of prior MYTD	50	81	82	124	154	77	110	80	84
	Total 2025/26	8,243	3,202	6,078	5,207	622	23,419	86,014	41,007	150,440
	Total 2024/25	5,377	3,095	6,560	5,730	335	21,097	69,081	50,106	140,284

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 9/10/2026	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	6,650	8,023	-17	23,186
Japan	2,751	2,878	-4	13,485
Colombia	1,426	1,673	-15	7,639
Korea	1,211	1,437	-16	5,826
Spain	217	602	-64	2,730
Top 5 importers	12,038	14,010	-14	50,136
Total U.S. corn export sales	17,399	23,833	-27	69,791
% of YTD current month's export projection	21%	27%	-	-
Change from prior week	1,027	1,232	-	-
Top 5 importers' share of U.S. corn export sales	69%	59%	-	72%
USDA forecast September 2026	83,189	87,000	-4	-
Corn use for ethanol USDA forecast, September 2026	142,240	140,970	1	-

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 9/10/2026	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2024-26 (1,000 mt)
	YTD MY 2026/27	YTD MY 2025/26		
China	9,858	0	NA	19,737
Mexico	1,804	2,200	-18	4,939
Egypt	513	505	2	3,402
Indonesia	428	392	9	2,205
Japan	452	428	5	2,128
Top 5 importers	13,055	3,525	270	32,410
Total U.S. soybean export sales	20,631	10,208	102	45,208
% of YTD current month's export projection	45%	25%	-	-
Change from prior week	1,702	854	-	-
Top 5 importers' share of U.S. soybean export sales	63%	35%	-	72%
USDA forecast, September 2026	45,858	41,368	11	-

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 9/10/2026	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	2,079	2,248	-7	3,744
Philippines	1,358	1,447	-6	2,677
Japan	1,012	953	6	2,050
Korea	874	873	0	1,888
Taiwan	477	492	-3	1,005
Nigeria	195	938	-79	878
China	NA	0	NA	863
Indonesia	252	663	-62	746
Thailand	313	300	4	690
Vietnam	243	353	-31	581
Top 10 importers	6,803	8,267	-18	15,121
Total U.S. wheat export sales	9,101	13,101	-31	21,015
% of YTD current month's export projection	43%	53%	-	-
Change from prior week	326	377	-	-
Top 10 importers' share of U.S. wheat export sales	75%	63%	-	72%
USDA forecast, September 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)

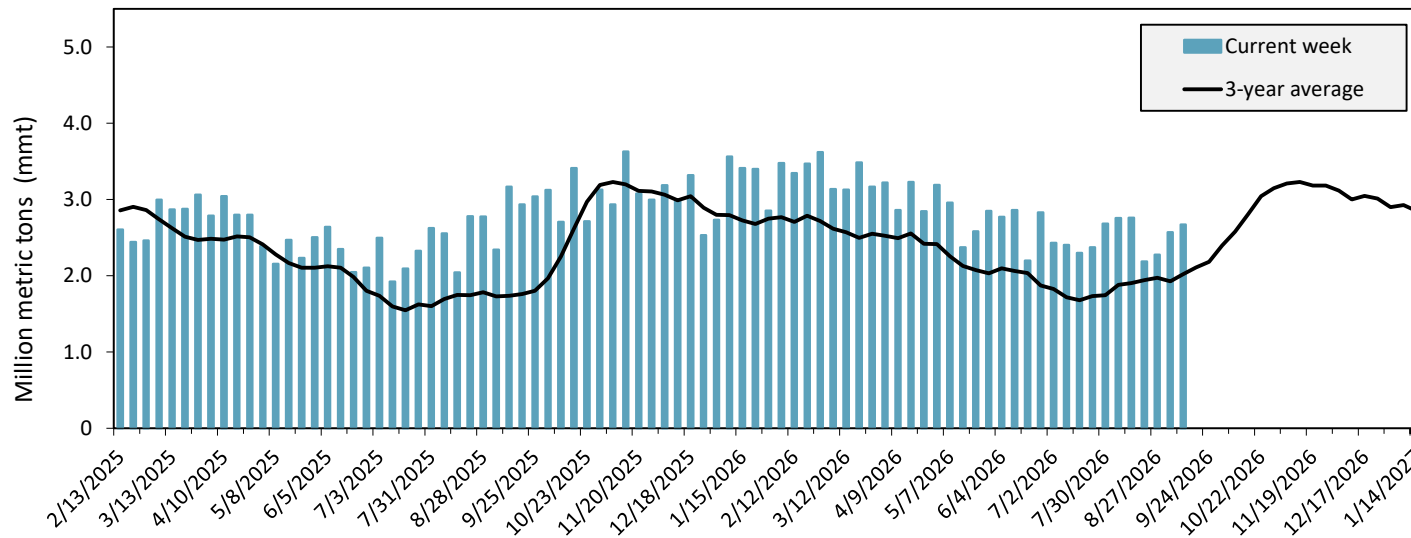
Port regions	Commodity	For the week ending 09/10/2026	Previous week	Current week as % of previous	2026 YTD	2025 YTD	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	491	544	90	18,804	16,332	115	202	467	24,214
	Soybeans	0	0	n/a	4,181	1,966	213	100	0	2,957
	Wheat	327	274	119	7,580	8,088	94	85	103	12,271
	All grain	818	818	100	30,880	26,501	117	129	187	39,721
Mississippi Gulf	Corn	661	698	95	26,915	26,202	103	77	109	37,115
	Soybeans	576	360	160	14,999	13,770	109	103	121	23,350
	Wheat	43	36	118	2,248	2,973	76	28	35	3,980
	All grain	1,281	1,094	117	44,285	42,985	103	81	106	64,484
Texas Gulf	Corn	52	81	65	1,287	412	313	270	418	590
	Soybeans	0	0	n/a	100	106	94	n/a	0	1,431
	Wheat	16	0	n/a	2,024	3,393	60	6	13	4,690
	All grain	68	81	84	6,989	4,387	159	39	52	7,774
Interior	Corn	235	325	72	11,383	10,249	111	91	119	15,546
	Soybeans	88	102	86	5,043	4,846	104	73	86	7,713
	Wheat	69	99	70	2,266	2,273	100	90	93	3,104
	All grain	408	528	77	19,018	17,720	107	87	106	26,888
Great Lakes	Corn	0	21	0	359	106	337	50	151	414
	Soybeans	8	0	n/a	66	0	n/a	n/a	96	63
	Wheat	0	21	0	241	193	125	183	120	434
	All grain	8	43	19	665	300	222	115	123	911
Atlantic	Corn	86	6	n/a	1,398	247	566	n/a	n/a	607
	Soybeans	0	3	0	615	499	123	29	33	1,085
	Wheat	1	0	n/a	20	53	38	202	36	81
	All grain	87	8	n/a	2,033	799	254	935	573	1,773
All Regions	Corn	1,525	1,675	91	60,146	53,548	112	107	158	78,486
	Soybeans	673	465	145	25,513	21,291	120	95	107	36,852
	Wheat	457	431	106	14,379	16,973	85	60	77	24,560
	All grain	2,670	2,572	104	104,381	92,797	112	91	120	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.

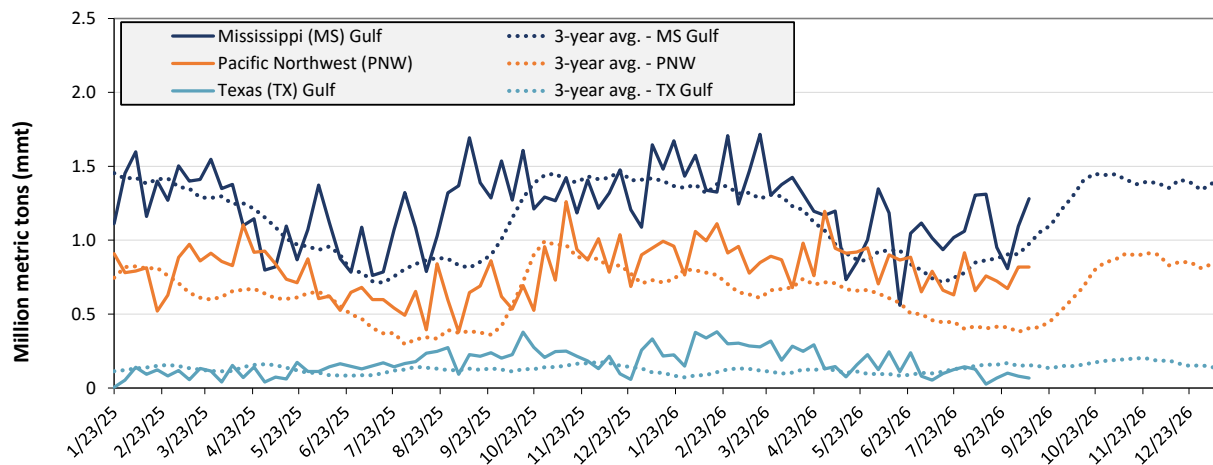
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending September 10: 2.7 mmt of grain inspected, up 4 percent from the previous week, unchanged from the same week last year, and up 32 percent from the 3-year average.

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

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



Week ending 09/10/26 inspections (mmt):

MS Gulf: 1.28

PNW: 0.82

TX Gulf: 0.07

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 17	down 16	up 15	unchanged
Last year (same 7 days)	down 10	down 72	down 19	up 57
3-year average (4-week moving average)	up 31	down 56	up 19	up 102

Source: USDA, Federal Grain Inspection Service.

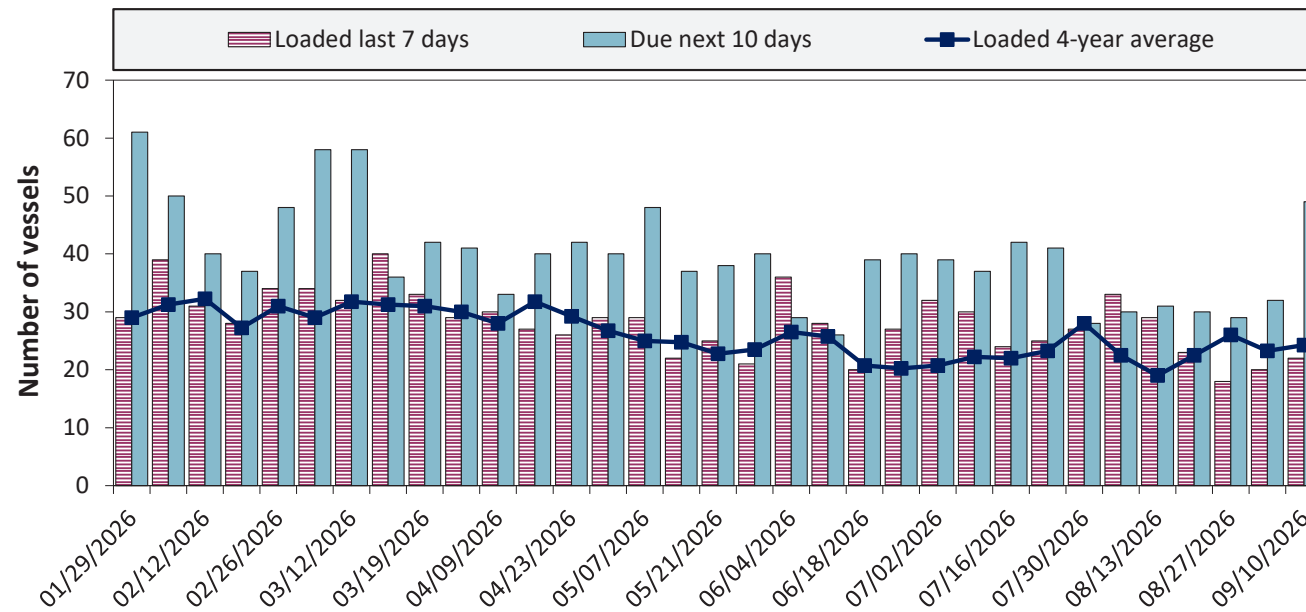
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
9/10/2026	23	22	49	11
9/3/2026	22	20	32	12
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

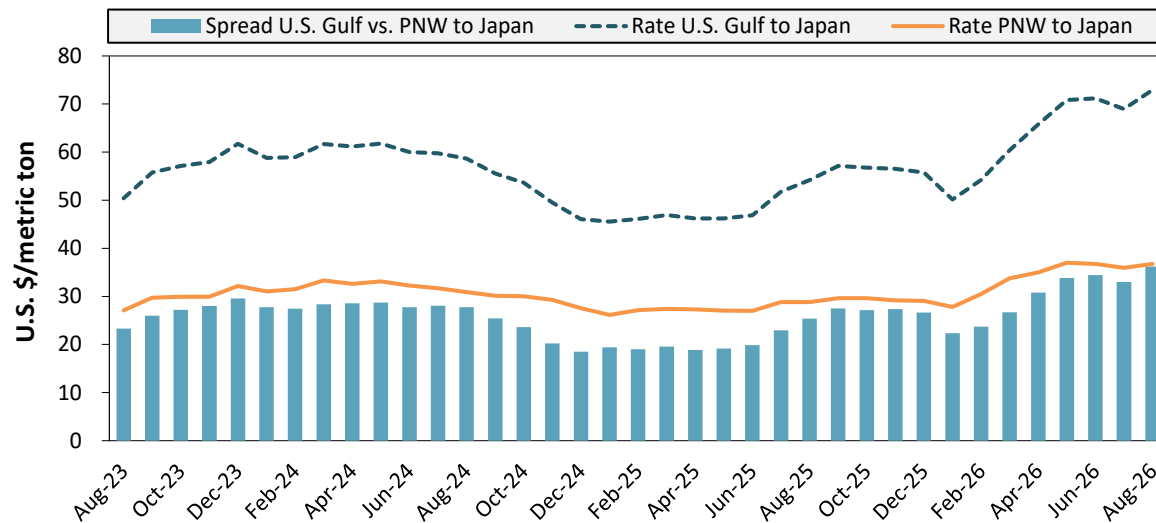


Week ending 09/10/26, number of vessels	Loaded	Due
Change from last year	-27%	-11%
Change from 4-year average	-9%	3%

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
August 2026	\$72.94	\$36.75	\$36.19
Change from August 2025	35%	28%	43%
Change from 4-year average	28%	18%	40%

Table 20. Ocean freight rates for selected shipments, week ending 09/12/2026

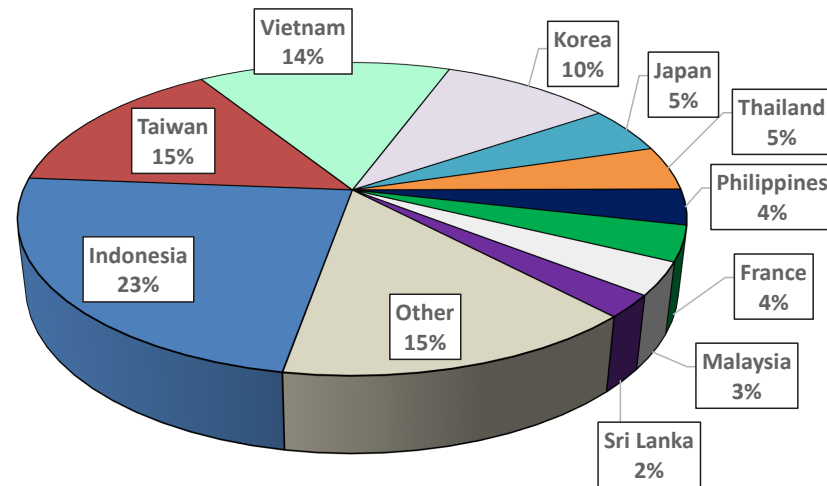
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	N. China	Heavy grain	Sep 3, 2026	Sep 20/30, 2026	68,000	76.00
U.S. Gulf	N. China	Heavy grain	Aug 28, 2026	Sep 1/10, 2026	68,000	73.50
U.S. Gulf	China	Heavy grain	Aug 6, 2026	Sept 2/11, 2026	66,000	69.25
PNW	Japan	Heavy grain	Aug 14, 2026	Nov 1/15, 2026	65,000	41.00
PNW	China	Heavy grain	Aug 4, 2026	Sep 1/10, 2026	65,000	35.00
PNW	Taiwan	Wheat	Jun 5, 2026	Aug 1/15, 2026	59,000	47.95
Brazil	China	Heavy grain	Aug 19, 2026	Sep 15/20, 2026	64,000	51.15
Brazil	China	Heavy grain	Aug 12, 2026	Aug 20/30, 2026	63,000	50.50
Brazil	China	Heavy grain	Jul 29, 2026	Aug 21/30, 2026	63,000	49.75
Brazil	China	Heavy grain	Jul 29, 2026	Aug 15/20, 2026	63,000	50.00
Brazil	China	Heavy grain	Jul 24, 2026	Aug 14/19, 2026	66,000	52.00
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	Poland	Heavy grain	Jul 8, 2026	Aug 14/21, 2026	60,000	30.90
Brazil	Jordan	Heavy grain	Jul 30, 2026	Aug 15/30, 2026	70,000	45.00

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

Source: Maritime Research, Inc.

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

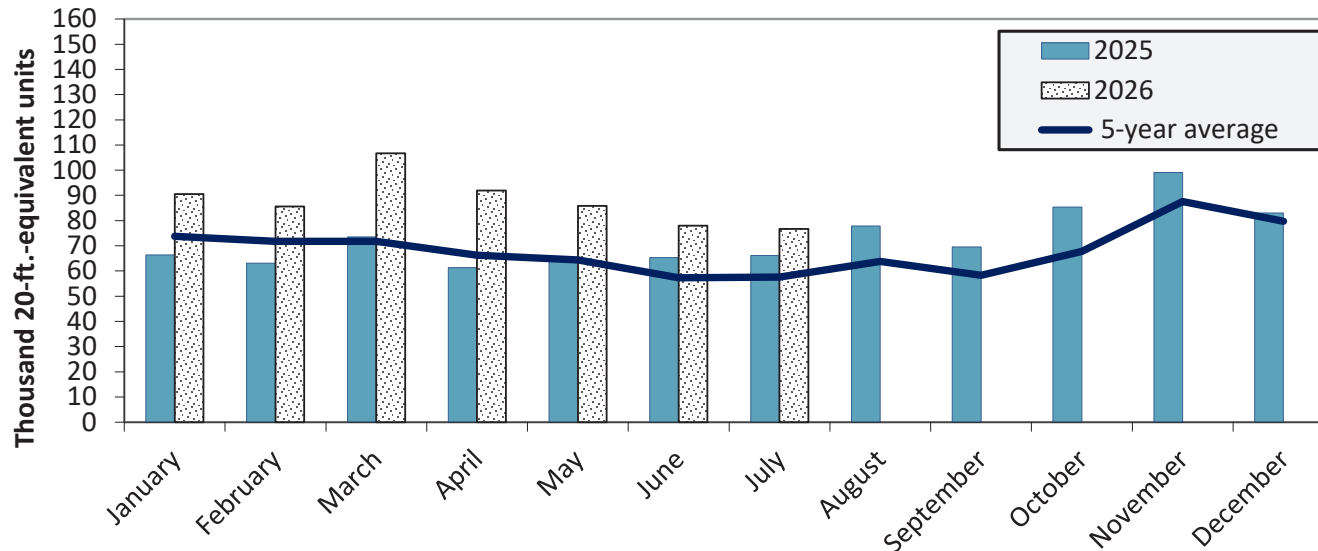
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Jun 2026



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 July 2026 were up 15.8 percent from last year and up 33.0 percent from the 5-year average.

Note: ft. = foot. The following harmonized tariff codes are used to calculate containerized grains movements: 1001, 100190, 100199, 100119, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 100790, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, 230400, and 230990.

Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

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

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