



Grain Transportation Report

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Railroads and Shippers Call on STB To Clarify Its “Preemption.”

On September 19, six industry associations representing shippers and railroads [asked the Surface Transportation Board \(STB\)](#) to provide guidance on the scope and application of its “preemption” (i.e., jurisdiction that supersedes that of other authorities) under the [Interstate Commerce Commission Termination Act of 1995](#) (ICCTA).

Under ICCTA’s provisions, STB’s jurisdiction over rail transportation preempts other State and Federal statutes. (STB’s preemption extends to matters of construction, acquisition, operation, abandonment, and discontinuance of rail infrastructure.) However, the associations, in their September 19 letter, expressed concern that STB’s preemption is “being eroded across the country every day,” and that this erosion results in “uncertainty and inconsistency” that “hurts not only railroads but all American businesses that rely on rail.” To counteract this trend, the associations seek STB’s clarifying guidance.

On September 24, STB [informed](#) the industry associations that it is considering issuing a policy statement on preemption before the end of the calendar year.

The issue of STB’s preemption came up last year when the California Air Resources Board proposed regulations on locomotive emissions requirements ([Grain Transportation Report, \(GTR\) May 9, 2024](#)).

CSX Adjusts Grain Rail Tariffs for New Marketing Year.

Earlier this month, CSX Transportation (CSX) released updated grain tariffs for marketing year (MY) 2025/26. These changes will go into effect on October 1, and they will be reflected in [GTR table 6](#) and [GTR table 7](#) at that time.

Most of CSX’s tariffs for corn and wheat shipments (to domestic destinations) are set to rise. For example, the corn tariff rate for a 90-car unit train from near Columbus, OH, (i.e., Marysville, OH) to Rose Hill, NC, will rise \$280 (from \$5,961 to \$6,241). The wheat tariff rate from Chicago, IL, to Albany, NY, is set to rise by \$264 per car (both for manifest and unit-train shipments). Nearly all of CSX’s grain tariff rates to export terminals (mostly soybeans) will not change in October.

As discussed at this year’s National Grain Car Council, CSX anticipates lower demand this year because of a strong Southeastern corn harvest—where harvest is currently underway ([GTR, August 28, 2025](#)).

According to the latest [Crop Progress](#) report, for the week ending September 21, farmers have completed 74 percent of North Carolina’s corn harvest (7 percentage points ahead of the 2020-24 average).

STB Posts Railroads’ Harvest Plans. A comparison between [2025](#) and [2024](#) railroad reports (from the Surface Transportation Board’s recent [National Grain Car Council](#)

meeting) shows a general increase in planned grain rail capacity for the West/Central United States, but a decrease in the East.

In the West/Central regions, BNSF Railway (BNSF) has 29,000 active grain cars (up 4 percent from last year). During peak harvest, BNSF plans to match last year’s number of operating shuttles (140) and regular destination efficiency trains (DETs) (30)—but run 5 more direct DETs (20 total). Union Pacific Railroad (UP) has 3,900 active locomotives (100 more than last year). Like last year, UP expects to operate over 80 shuttles/unit trains during peak harvest. Canadian National Railway (CN) has dedicated 1,525 grain hopper cars to U.S. service (270 more than last year). Also, despite having only 20,650 grain cars (640 fewer), CPKC expects to run 140 dedicated grain trains across its U.S./Canadian network during harvest peak (40 more).

In the East, CSX Transportation (CSX) has 2,362 active locomotives (24 more than last year) but only 2,900 active grain cars (100 fewer). During peak harvest, CSX expects to run 50 grain unit trains (5 fewer). Norfolk Southern Railway has 3,365 grain cars in its fleet (238 fewer) and expects to operate 105 grain unit trains per month during peak harvest (5 fewer).

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 11, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2025/26 totaled 36.27 million metric tons (mmt), up 11 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26, which began September 1, were 1.23 mmt. Net [soybean export sales](#) for MY 2025/26, which also began September 1, were 0.92 mmt. Net [wheat export sales](#) for MY 2025/26 were 0.38 mmt, up 24 percent from last week.

Rail

U.S. Class I railroads originated 24,221 [grain carloads](#) during the week ending September 13. This was a 9-percent increase from the previous week, 8 percent more than last year, and 17 percent more than the 3-year average.

Average September [shuttle secondary railcar bids/offers](#) (per car) were \$297 above tariff for the week ending September 18. This was \$268 more than last week and \$28 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$75 above tariff. This was unchanged from last week, and \$425 lower than this week last year.

Barge

For the week ending September 20, [barged grain movements](#) totaled 260,950 tons. This was 4 percent more than the previous week and 48 percent less than the same period last year.

For the week ending September 20, 166 grain barges [moved down river](#)—18 fewer than last week. There were 794 grain barges [unloaded](#) in the New Orleans region, 7 percent fewer than last week.

Ocean

For the week ending September 18, 37 [oceangoing grain vessels](#) were loaded in the Gulf—48 percent more than the same period last year. Within the next 10 days (starting September 19), 42 vessels were expected to be loaded—14 percent fewer than the same period last year.

As of September 18, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$58.00, up 1 percent from the previous week. The rate from the Pacific Northwest to Japan was \$29.75 per mt, unchanged from the previous week.

Fuel

For the week ending September 22, the [U.S. average diesel fuel price](#) increased 1.0 cent from the previous week to \$3.749 per gallon, 21.0 cents above the same week last year.



Once Again... Low Water on Mississippi River

Impacts Harvest Logistics

Barge transportation on the Mississippi River System (MRS) provides an efficient, cost-effective means of transporting surplus grain production from the Corn Belt to export terminals on the U.S. Gulf. Despite the barge system's clear efficiencies, adverse river conditions (including flooding and drought) can drive up the costs and transit time of barge transportation.

In the fall of 2022, drought on the MRS led to record barge rates, including a spot rate at St. Louis of \$105.85/ton during the week of October 11 ([Grain Transportation Report \(GTR\), March 16, 2023](#)). Although, since then, low water has returned to areas of the MRS, spot rates have not returned to their 2022 highs.

This article first discusses current river conditions on the MRS. Next is a summary of recent actions taken by the U.S. Coast Guard (USCG) and the U.S. Army Corps of Engineers (USACE) in response to low water levels. (While these restrictions are in place, they reduce barge capacity.) From there, the article assesses demand for barge transportation by examining current export sales. Last is a look at the impacts of low water levels on barge rates based on previous years.

Following Extra-Dry August in Ohio River Basin, Lower Mississippi River Levels Fall

For the first half of 2025, nearly all the Mississippi River Basin received precipitation above the long-term average. However, August was exceptionally dry—particularly for the Ohio River Basin. According to the National Oceanic and Atmospheric Administration (NOAA), August 2025 was the [driest August on record](#) for the Ohio Valley. Normally, the Ohio River contributes about 50 percent of the water flow in the lower Mississippi River. However, as of September 24, the Ohio River is contributing just [12 percent](#) of the lower Mississippi River's water flow.

Currently (as of September 24), where the Ohio River converges with the Mississippi River, the [Ohio River gauge at Cairo, IL](#), is at 10.7 feet—just above the low water threshold (10.3 feet). The river gauge at Cairo was below the low water threshold from September 17-24, but recent [rainfall](#) in the Mid-South and Ohio River Valley has raised river levels.

Further downstream (on the Mississippi River), the [gauge at Memphis, TN](#), is measuring -7.1 feet—just above the low water threshold (-8 feet). At [St. Louis](#), the gauge is measuring 1.4

feet—down from over 23 feet at the start of August, but still above the low water threshold (-3.2 feet). While recent rainfall has stabilized river levels, NOAA's [6-10 day precipitation outlook](#) is showing below average rainfall for much of the Ohio River basin.

Restrictions Reduce Barge Capacity

As covered previously in the GTR, the USCG and USACE have implemented several rounds of navigational restrictions and dredging operations since the beginning of September. In the short run (while restrictions are in place), these actions reduce barge capacity, but raise it in the long term by mitigating the impacts of low water levels.

Navigational Restrictions. USCG's latest draft and tow size restrictions went into effect on [September 19](#). For southbound traffic between Cairo and Lake Providence, LA, draft levels may not exceed 10 feet, and for traffic between Lake Providence and mile marker 303 (south of Natchez, MS), draft levels may not exceed 10.5 feet. For all southbound traffic, tows may not be more than 6 barges wide. For northbound traffic (e.g., fertilizer), between mile marker 303 and Cairo, draft levels may not

exceed 9.5 feet, and tows may not be configured more than 4-6 barges wide (depending on the load size) and 7 barges long.

Dredging. USACE has responded to low water areas by dredging. From [September 17-18](#), the vessel *Jadwin* dredged a Mississippi River section just south of Memphis, and from [September 23-24](#), the *Jadwin* dredged a river section just north of Memphis. While the *Jadwin* was dredging (both times), the affected area was closed to barge traffic. In mid-September, the vessel [Potter](#) dredged a Mississippi River section near Hickman, KY, which stayed open to navigation during the work. On September 19, the vessel [Goetz](#) began dredging at the Lower Chain of Rocks Canal entrance of the upper Mississippi River, near St. Louis, MO, and the work is expected to be completed on October 2. Until the dredging is done, the area will be closed to traffic from 5 pm to 7 am and open from 7 am to 5 pm.

Export Demand Is Strong for Corn, but Weak for Soybeans

The demand for barge transportation is largely determined by corn and soybean exports. According to [USDA's latest grain Modal Share Analysis](#), barges transported 48 percent of both corn and soybean exports in 2022. Typically, soybeans are shipped immediately after harvest (i.e., October-January), whereas corn is shipped throughout the marketing year.

Corn. [USDA projects](#) that U.S. farmers will harvest 427.1 million metric tons (mmt) of corn in marketing year (MY) 2025/26. If realized, this harvest will be the largest on record, beating the previous record (from 2023) by 37 mmt. Reflecting the large supplies, corn exports are projected to reach a record 75.6 mmt—up from 71.9 mmt in MY 2024/25.

Record corn export projections are supported by strong export sales ([GTR table 15](#)). Year to date (YTD) as of September 11, corn export sales for MY 2025/26 totaled 23.8 mmt—46 percent above the prior 5-year average (hereafter, “average”) for the same period in previous years.¹

By destination, YTD MY 2025/26 corn export sales were higher to some destinations than others, but above average for most. MY 2025/26 sales to Mexico totaled 8.0 mmt—51 percent above average. From 2020 to 2024, 34 percent of corn exports to Mexico were barged down the MRS and shipped from New Orleans, LA. (Most corn exports to Mexico are [shipped by rail](#).)

YTD MY 2025/26 sales to Japan totaled 2.9 mmt—up 94 percent from average. From 2020 to 2024, about 55 percent of corn exports to Japan were barged down the MRS and shipped from New Orleans. YTD MY 2025/26 sales to Colombia totaled 1.7 mmt—up 181 percent from average. From 2020 to 2024, nearly all corn exports to Colombia were barged down the MRS and shipped from New Orleans. YTD

MY 2025/26 sales to Spain (not a typical buyer of U.S. corn) totaled 0.6 mmt. These exports will likely be shipped from New Orleans.

Soybeans. Unlike corn, soybean exports are projected to fall in MY 2025/26, because of increased domestic use and changing trade patterns. [USDA currently projects](#) U.S. soybean exports will be 45.9 mmt in MY 2025/26—down from 51.0 mmt in MY 2024/25.

Reflecting USDA's projected decline in exports, YTD MY 2025/26 soybean export sales totaled 10.3 mmt—down 54 percent from average ([GTR table 16](#)). This sharp drop owes to the fact that China—typically the largest buyer of U.S. soybeans—has yet to make any purchases for MY 2025/26. YTD sales to all countries except China were down 12 percent from average.

From the perspective of barge transportation, some of the decline in soybean exports will be offset by increased exports of soybean meal—a byproduct of the increased soybean crush in the United States. [USDA projects](#) that the United States will export a record 17.4 mmt of soybean meal in MY 2025/26. From 2020 to 2024, about 45 percent of U.S. soybean meal exports were barged down the MRS and shipped from New Orleans.

Looking Forward: Impacts to Barge Rates

As of September 23, the barge freight rate for shipping grain along the lower Mississippi River (from Cairo to Memphis) is \$19.53 per ton. This rate is up 31 percent from 4 weeks

¹ Year to date (YTD) numbers for corn and soybean exports are all “as of September 11.”

ago, but it is 14 percent lower than the same time last year and 31 percent below the 3-year average ([GTR table 9](#)).

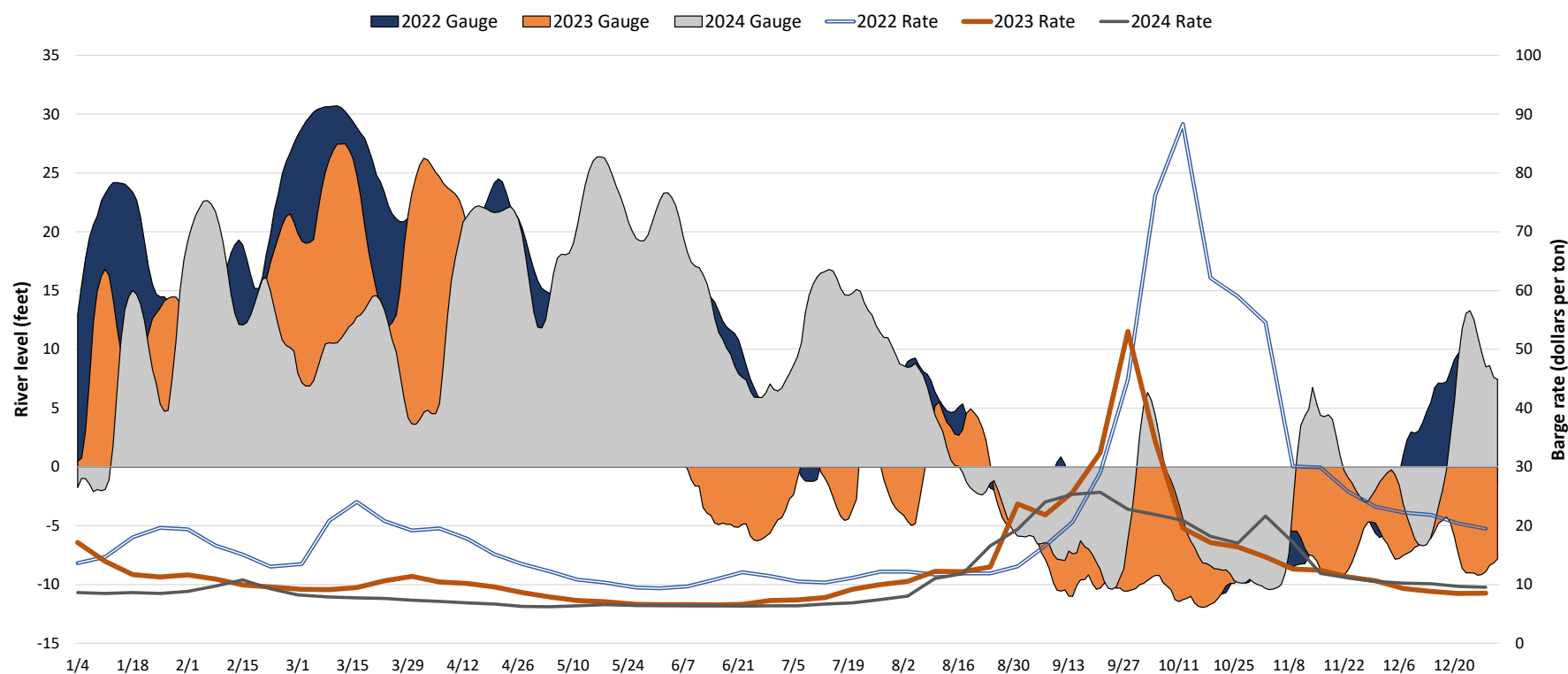
Similar to 2023 and 2024, barge rates have not risen significantly (despite low water levels) and are well below the records set in 2022 (fig. 1). In mid-October 2023, the river gauge at Memphis reached a record low (−12 feet)—almost 3 feet lower than water levels in October 2022. Still, despite 2023's lower water levels, barge rates in mid-October 2023 were 73 percent below 2022's record high barge rates.

One reason for the lower barge rates during MRS low water periods since 2022 is that government agencies (e.g., USCG and USACE), barge operators, and shippers learned valuable lessons from the 2022 challenges and have been better prepared since then ([GTR, March 14, 2024](#)). Another reason for the lower rates since 2022 is that soybean exports—which mostly ship immediately after harvest—were higher during MY 2022/23 than they have been in the years since.

As low water levels once again beset the MRS, below average soybean exports may keep barge rates from rising substantially. However, the large volumes of corn exports and the potential for trade deals involving soybeans may raise the demand for barge transportation in the coming months. In the meantime, USCG and USACE are working to maintain navigability of this key waterway system.

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Figure 1. River gauge readings and spot barge rates at Memphis, TN, 2022-24



Source: USDA, Agricultural Marketing Service.

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

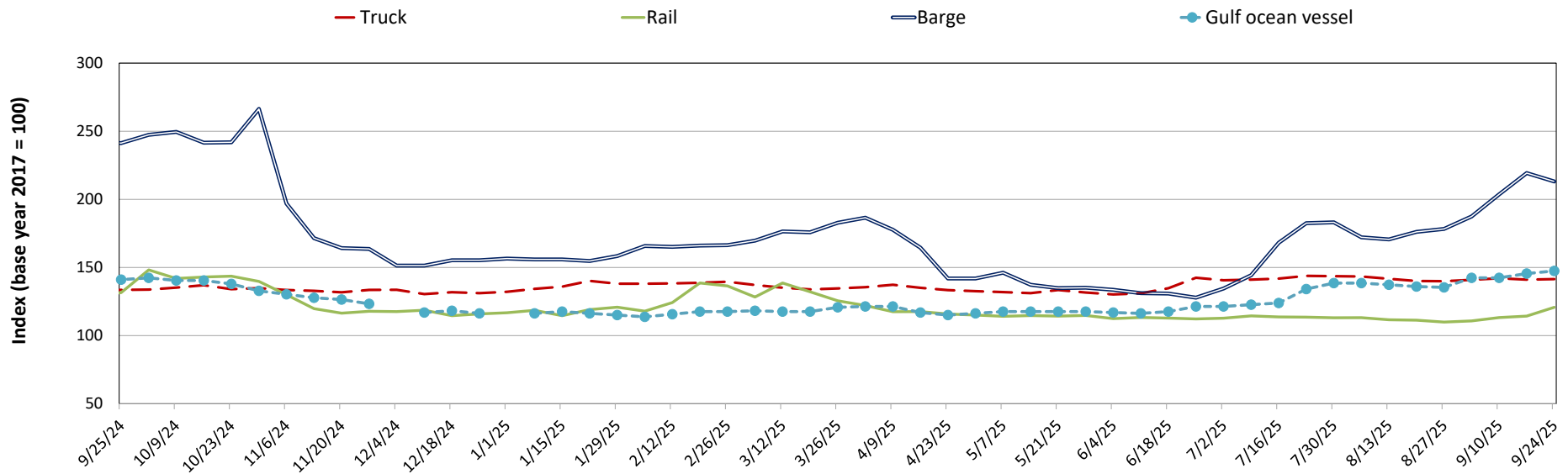
Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
09/24/25	141	121	213	147	141
09/17/25	141	114	219	146	141
09/25/24	134	132	241	141	145

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.

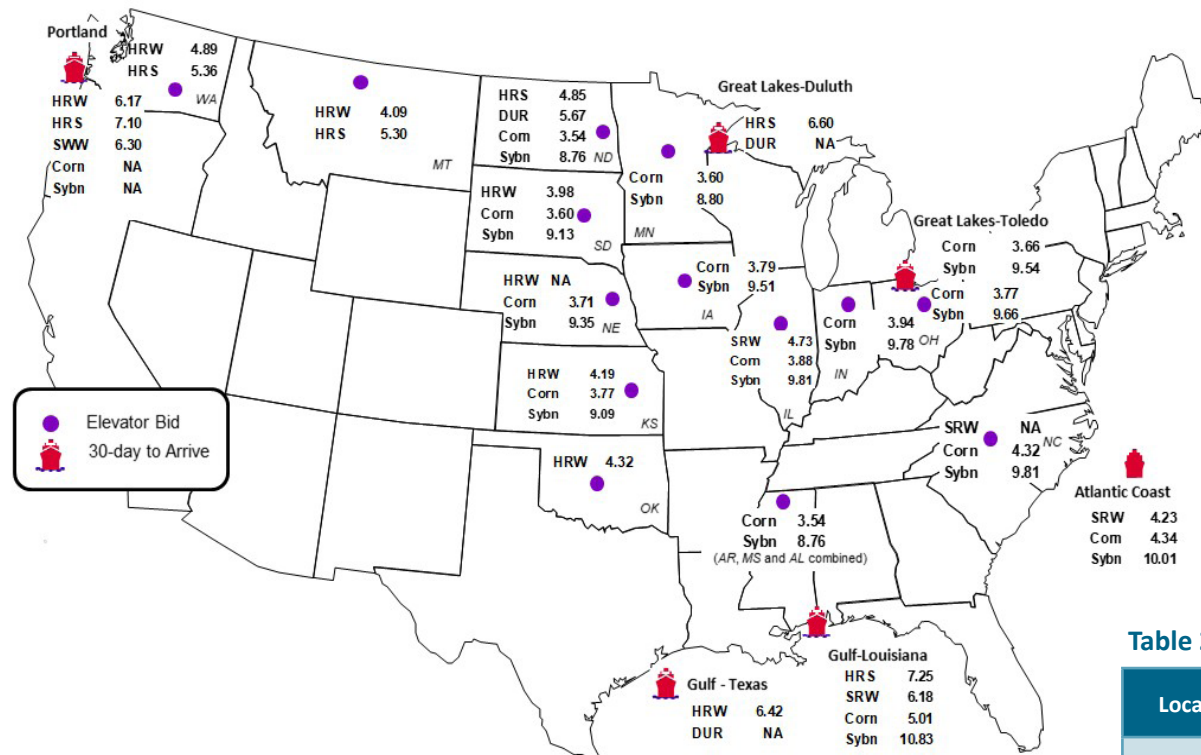
Figure 1. Grain transportation cost indicators as of week ending 9/24/25



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: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

Table 2a. Market update: U.S. origins to export position price spreads (\$/bushel)

Commodity	Origin-destination	9/19/2025	9/12/2025
Corn	IL-Gulf	-1.13	-1.15
Corn	NE-Gulf	-1.30	-1.31
Soybean	IA-Gulf	-1.32	-1.26
HRW	KS-Gulf	-2.23	-2.28
HRS	ND-Portland	-2.25	-2.36

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	9/19/2025	Week ago 9/12/2025	Year ago 9/20/2024
Kansas City	Wheat	Dec	5.070	5.146	5.780
Minneapolis	Wheat	Dec	5.675	5.718	6.080
Chicago	Wheat	Dec	5.224	5.234	5.824
Chicago	Corn	Dec	4.238	4.298	4.112
Chicago	Soybean	Dec	10.254	10.462	10.380

Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

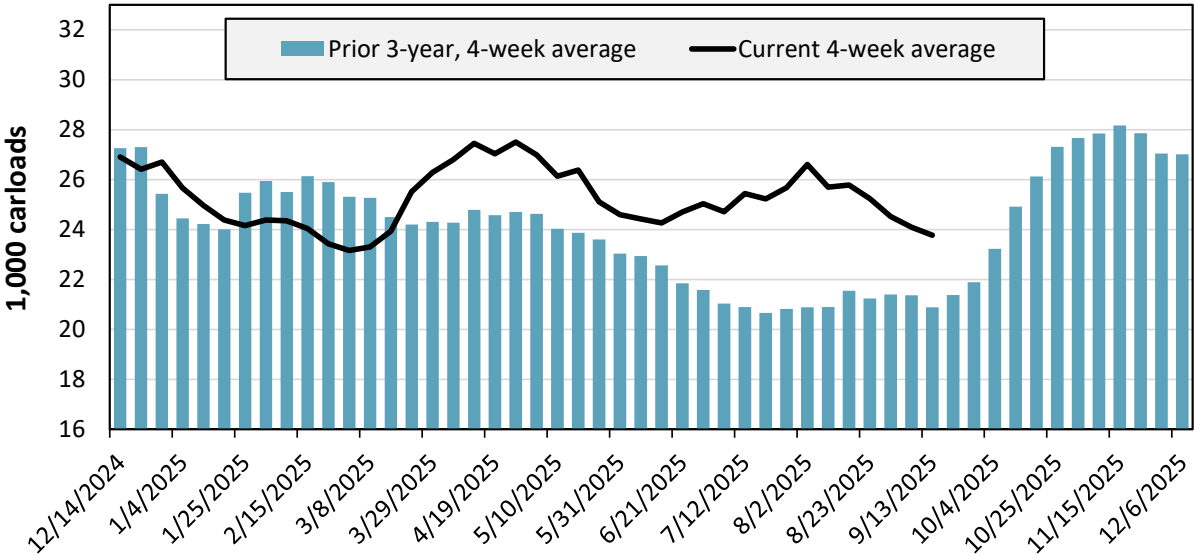
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 9/13/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,214	1,605	11,652	5,568	3,317	865	24,221
This week last year	1,212	2,555	11,019	4,586	2,289	815	22,476
2025 YTD	56,124	100,055	406,147	211,966	102,629	51,260	928,181
2024 YTD	60,709	98,903	383,350	188,706	98,276	34,383	864,327
2025 YTD as % of 2024 YTD	92	101	106	112	104	149	107
Last 4 weeks as % of 2024	75	77	103	114	130	125	104
Last 4 weeks as % of 3-yr. avg.	81	99	115	118	125	137	114
Total 2024	87,911	143,353	557,544	279,532	142,383	58,512	1,269,235

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. NS = Norfolk Southern; 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 13, grain carloads were down 1 percent from the previous week, up 4 percent from last year, and up 14 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: 9/12/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	16.4	28.0	10.5	17.9	8.8	30.8	18.7
	Average over last 4 weeks	18.6	24.7	10.4	15.1	8.2	40.7	19.6
	Average of same 4 weeks last year	24.5	24.1	15.6	21.3	10.6	n/a	19.2
Average grain unit train speeds (miles per hour)	This week	22.9	21.0	25.8	23.2	23.5	15.2	21.9
	Average over last 4 weeks	23.4	19.9	25.1	23.3	23.9	13.9	21.6
	Average of same 4 weeks last year	23.6	19.9	24.1	22.2	23.7	n/a	22.7

Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.

These service metrics are published weekly on the [Surface Transportation Board's website](#) and on [AgTransport](#). For more information on each service metric, see [49 CFR § 1250.2](#).

Source: Surface Transportation Board.

Table 4b. Rail service metrics—unfilled grain car orders and delays

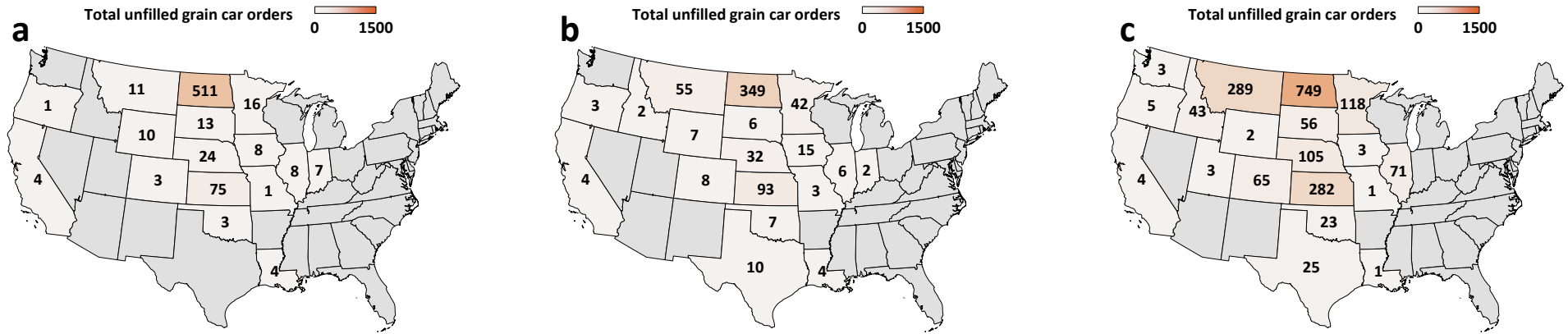
For the week ending: 9/12/2025		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	9	7	279	67	4	298	663
	Average over last 4 weeks	12	5	262	67	8	320	673
	Average of same 4 weeks last year	27	9	437	108	4	n/a	584
Average number of loaded grain cars not moved in over 48 hours	This week	3	193	284	57	3	299	840
	Average over last 4 weeks	21	184	253	69	6	504	1,036
	Average of same 4 weeks last year	27	150	562	160	4	n/a	903
Average number of grain unit trains held	This week	0	0	1	2	0	8	11
	Average over last 4 weeks	0	0	2	3	0	10	14
	Average of same 4 weeks last year	0	0	12	10	0	n/a	22
Total unfilled manifest grain car orders	This week	14	0	156	82	0	573	825
	Average over last 4 weeks	5	3	165	149	0	442	762
	Average of same 4 weeks last year	1	2	1,170	478	0	n/a	1,651

Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.

These service metrics are published weekly on the [Surface Transportation Board's website](#) and on [AgTransport](#). For more information on each service metric, see [49 CFR § 1250.2](#).

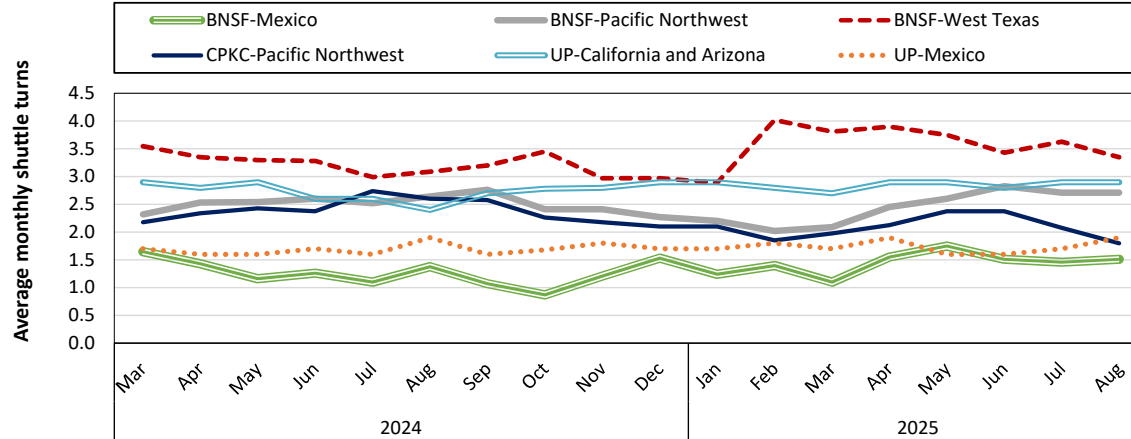
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 9/12/2025 (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

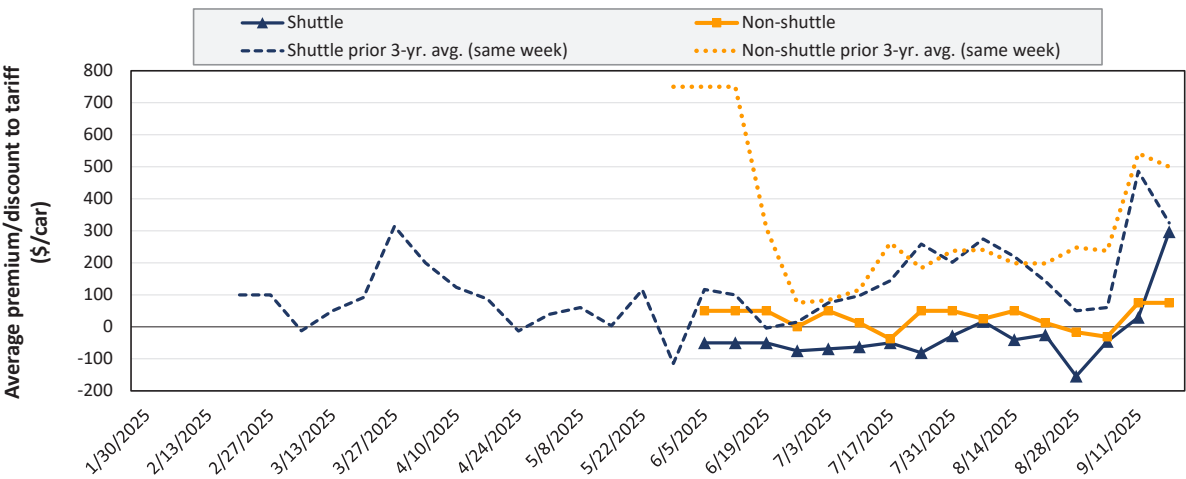


In August 2025, BNSF Railway's average monthly grain shuttle turns were 1.5 to Mexico, 2.7 to the Pacific Northwest, and 3.4 to West Texas. CPKC's shuttle turns averaged 1.8 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.9 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., one 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 2025



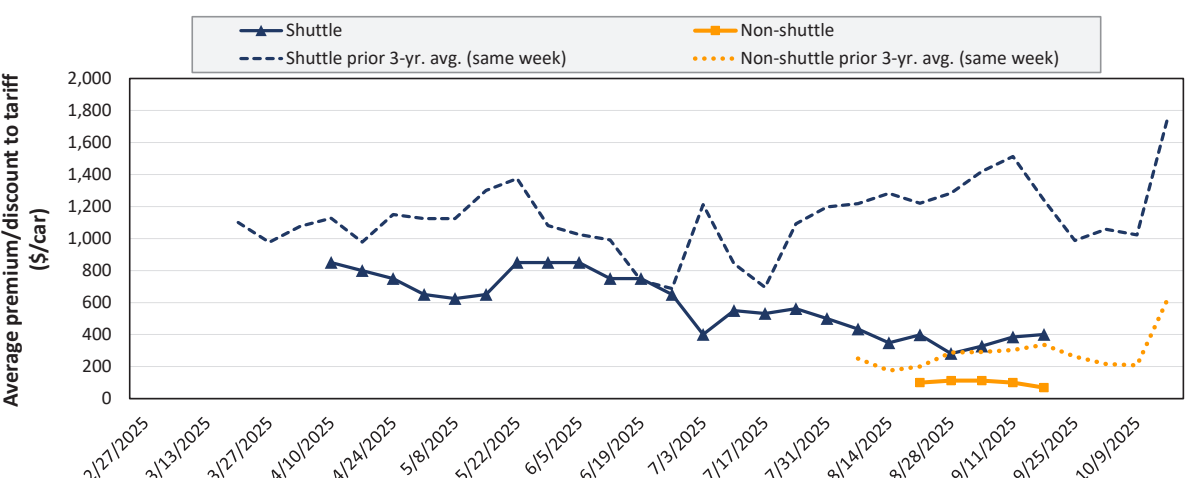
Average non-shuttle bids/offers are unchanged this week, and are at the peak.

Average shuttle bids/offers rose \$268 this week and are at the peak.

9/18/2025	BNSF	UP
Non-Shuttle	\$75	n/a
Shuttle	\$244	\$350

Note: Shuttle bids/offers are for shuttle trains—90+ 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 Tradewest Brokerage Company and the Malsam Company.

Figure 7. Secondary market bids/offers for railcars to be delivered in October 2025



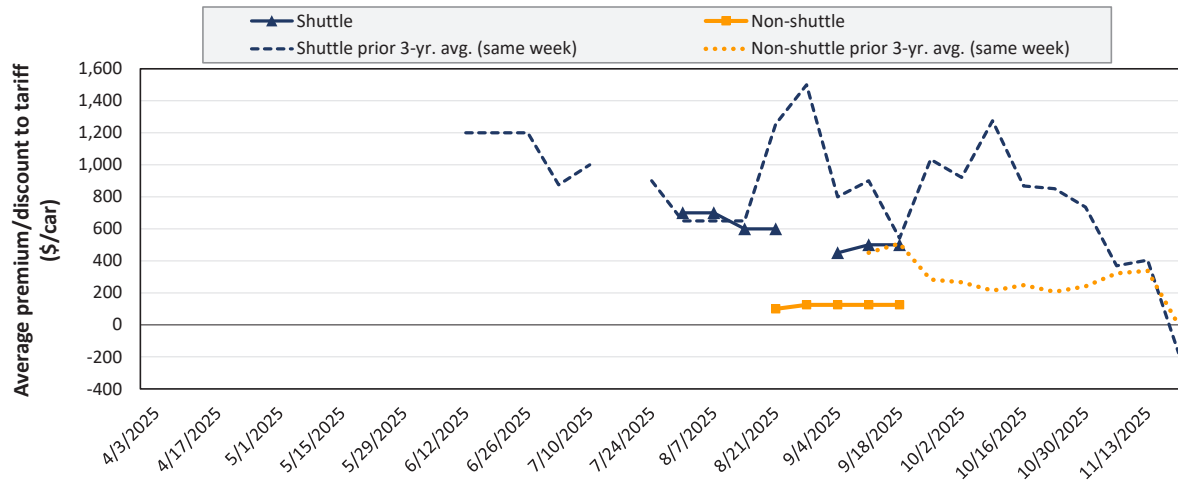
Average non-shuttle bids/offers fell \$31 this week, and are \$44 below the peak.

Average shuttle bids/offers rose \$17 this week and are \$449 below the peak.

9/18/2025	BNSF	UP
Non-Shuttle	\$100	\$38
Shuttle	\$519	\$283

Note: Shuttle bids/offers are for shuttle trains—90+ 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 Tradewest Brokerage Company and the Malsam Company.

Figure 8. Secondary market bids/offers for railcars to be delivered in November 2025



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

Average shuttle bids/offers are unchanged this week and are \$200 below the peak.

9/18/2025	BNSF	UP
Non-Shuttle	\$150	\$100
Shuttle	\$500	n/a

Note: Shuttle bids/offers are for shuttle trains—90+ 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 Tradewest Brokerage Company and the Malsam Company.

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

For the week ending: 9/18/2025		Delivery period					
		Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26
Non-shuttle	BNSF	75	100	150	n/a	n/a	n/a
	Change from last week	0	-25	0	n/a	n/a	n/a
	Change from same week 2024	-425	-500	-550	n/a	n/a	n/a
	UP	n/a	38	100	100	n/a	n/a
	Change from last week	n/a	-38	0	0	n/a	n/a
	Change from same week 2024	n/a	-188	n/a	n/a	n/a	n/a
Shuttle	BNSF	244	519	500	575	n/a	n/a
	Change from last week	269	50	0	25	n/a	n/a
	Change from same week 2024	44	-963	n/a	-425	n/a	n/a
	UP	350	283	n/a	n/a	n/a	n/a
	Change from last week	267	-17	n/a	n/a	n/a	n/a
	Change from same week 2024	-100	-967	n/a	n/a	n/a	n/a
	CPKC	n/a	100	100	n/a	n/a	n/a
	Change from last week	n/a	0	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	-600	-250	n/a	n/a	n/a

Note: Shuttle bids/offers are for shuttle trains—90+ 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 Tradewest Brokerage Company and 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 2025

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	\$130.57	\$5,962.57	\$1.61	\$59.21	2.6
	BNSF	Williston, ND	Superior, WI	Shuttle	\$4,291	\$67.21	\$4,358.21	\$1.18	\$43.28	4.2
	CPKC	Westby, MT	St. Louis, MO	Unit	\$5,788	\$500.22	\$6,288.22	\$1.70	\$62.45	3.4
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	\$4,804	\$78.21	\$4,882.21	\$1.32	\$48.48	3.6
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	\$6,215	\$165.11	\$6,380.11	\$1.72	\$63.36	2.2
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	\$2,865	\$32.34	\$2,897.34	\$0.78	\$28.77	6.9
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	\$5,732	\$168.19	\$5,900.19	\$1.59	\$58.59	4.2
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	\$5,838	\$139.37	\$5,977.37	\$1.62	\$59.36	2.6
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	\$5,412	\$114.18	\$5,526.18	\$1.49	\$54.88	3.0
	CPKC	Minot, ND	Kalama, WA	Unit	\$5,298	\$442.89	\$5,740.89	\$1.55	\$57.01	-3.3
	CPKC	Nekoma, ND	Chicago, IL	Manifest	\$5,030	\$266.18	\$5,296.18	\$1.43	\$52.59	4.0
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	\$3,400	\$70.18	\$3,470.18	\$0.94	\$34.46	-12.0
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	\$3,600	\$61.93	\$3,661.93	\$0.99	\$36.36	-14.5
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	\$5,800	\$209.00	\$6,009.00	\$1.62	\$59.67	-13.9
	BNSF	Garden City, KS	San Bernardino, CA	DET	\$5,700	\$151.36	\$5,851.36	\$1.58	\$58.11	-1.4
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,200	\$94.49	\$4,294.49	\$1.16	\$42.65	-12.6
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,000	\$83.27	\$4,083.27	\$1.10	\$40.55	-13.5
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	\$3,500	\$95.04	\$3,595.04	\$0.97	\$35.70	-14.8
	BNSF	Wichita, KS	Chicago, IL	DET	\$3,700	\$69.63	\$3,769.63	\$1.02	\$37.43	-12.6
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	\$3,900	\$70.18	\$3,970.18	\$1.07	\$39.43	-11.9
	UP	Byers, CO	Houston, TX	Shuttle	\$4,525	\$395.42	\$4,920.42	\$1.33	\$48.86	-7.7
	UP	Goodland, KS	Kansas City, MO	Manifest	\$4,967	\$147.90	\$5,114.90	\$1.38	\$50.79	1.7
	UP	Medford, OK	Houston, TX	Shuttle	\$3,775	\$195.16	\$3,970.16	\$1.07	\$39.43	-9.3
	UP	Salina, KS	Houston, TX	Shuttle	\$4,025	\$260.10	\$4,285.10	\$1.16	\$42.55	-8.7
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	\$4,791	\$84.92	\$4,875.92	\$1.32	\$48.42	3.6
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	\$4,439	\$83.38	\$4,522.38	\$1.22	\$44.91	3.9
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	\$2,032	\$36.63	\$2,068.63	\$0.56	\$20.54	-0.6
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	\$8,348	\$0.00	\$8,348.00	\$2.26	\$82.90	0.0
	CSX	Chicago, IL	Albany, NY	Unit	\$7,413	\$0.00	\$7,413.00	\$2.00	\$73.61	0.0
	CSX	Chicago, IL	Buffalo, NY	Manifest	\$5,924	\$0.00	\$5,924.00	\$1.60	\$58.83	0.0
	CSX	Chicago, IL	Indiantown, FL	Manifest	\$8,568	\$0.00	\$8,568.00	\$2.32	\$85.08	0.0

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. HRS = hard red spring. HRW = hard red winter. 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, CPKC, CSX, and UP.

Table 7. Rail tariff rates for corn and soybean unit/shuttle train shipments, September 2025

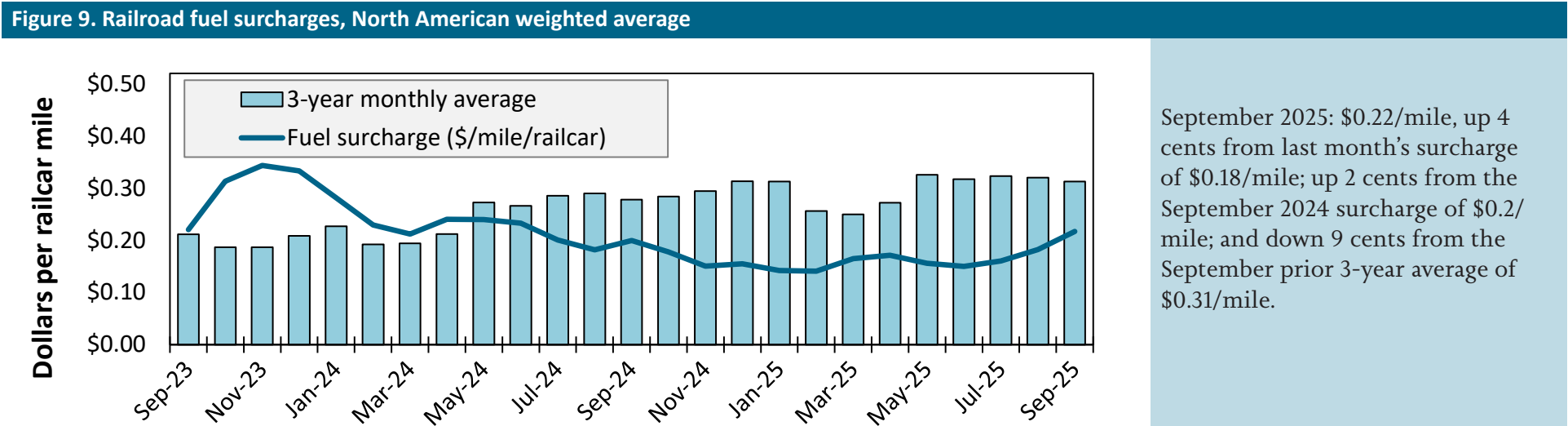
Commodity	Railroad	Origin	Destination	Car Ownership	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Corn	BNSF	Clarkfield, MN	Hereford, TX	Railroad	\$5,800	\$117.26	\$5,917.26	\$1.49	\$58.76	4.5
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	\$5,470	\$185.24	\$5,655.24	\$1.43	\$56.16	-3.7
	BNSF	Edison, NE	Hanford, CA	Railroad	\$6,000	\$195.36	\$6,195.36	\$1.56	\$61.52	3.8
	BNSF	Edison, NE	Hereford, TX	Railroad	\$5,040	\$80.08	\$5,120.08	\$1.29	\$50.84	5.6
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	\$5,350	\$193.49	\$5,543.49	\$1.40	\$55.05	-3.8
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	\$4,560	\$102.85	\$4,662.85	\$1.18	\$46.30	6.0
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	\$4,800	\$84.04	\$4,884.04	\$1.23	\$48.50	5.8
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	\$4,540	\$103.07	\$4,643.07	\$1.17	\$46.11	6.0
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	\$5,430	\$156.09	\$5,586.09	\$1.41	\$55.47	-3.6
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	\$5,430	\$183.26	\$5,613.26	\$1.42	\$55.74	-3.7
	CN	Gibson City, IL	Reserve, LA	Private	\$2,191	\$338.87	\$2,529.87	\$0.64	\$25.12	9.3
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,571	\$338.87	\$2,909.87	\$0.73	\$28.90	8.0
	CPKC	Delhi, LA	Morton, MS	Railroad	\$1,342	\$49.20	\$1,391.20	\$0.35	\$13.82	0.1
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,047	\$509.36	\$5,556.36	\$1.40	\$55.18	-2.5
	CPKC	Glenwood, MN	Boardman, OR	Railroad	\$5,513	\$490.14	\$6,003.14	\$1.51	\$59.61	2.7
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	\$5,961	\$0.00	\$5,961.00	\$1.50	\$59.20	0.0
	CSX	Marysville, OH	Rose Hill, NC	Railroad	\$6,139	\$0.00	\$6,139.00	\$1.55	\$60.96	0.0
	CSX	Olney, IL	Fairmount, GA	Railroad	\$4,706	\$0.00	\$4,706.00	\$1.19	\$46.73	0.0
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	\$4,085	\$234.94	\$4,319.94	\$1.09	\$42.90	6.7
	UP	Frankfort, KS	Calipatria, CA	Railroad	\$6,005	\$534.48	\$6,539.48	\$1.65	\$64.94	4.2
Soybeans	UP	Mead, NE	Keyes, CA	Railroad	\$6,165	\$590.58	\$6,755.58	\$1.70	\$67.09	4.0
	UP	Nebraska City, NE	Amarillo, TX	Railroad	\$5,005	\$242.76	\$5,247.76	\$1.32	\$52.11	5.5
	UP	Sloan, IA	Burley, ID	Railroad	\$5,685	\$399.84	\$6,084.84	\$1.53	\$60.43	4.6
	UP	Sterling, IL	Nashville, AR	Railroad	\$4,225	\$245.82	\$4,470.82	\$1.13	\$44.40	6.5
	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	\$6,135	\$168.08	\$6,303.08	\$1.70	\$62.59	-1.0
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	\$5,185	\$179.74	\$5,364.74	\$1.45	\$53.27	-22.6
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	\$6,085	\$161.59	\$6,246.59	\$1.69	\$62.03	-0.9
	BNSF	Casselton, ND	St. Louis, MO	Railroad	\$3,400	\$94.05	\$3,494.05	\$0.94	\$34.70	-24.3
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	\$6,185	\$178.64	\$6,363.64	\$1.72	\$63.19	-1.0
	CN	Gibson City, IL	Reserve, LA	Private	\$2,191	\$338.87	\$2,529.87	\$0.68	\$25.12	9.6
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,571	\$338.87	\$2,909.87	\$0.79	\$28.90	8.3
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,785	\$509.36	\$6,294.36	\$1.70	\$62.51	-2.2
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	\$3,526	\$389.31	\$3,915.31	\$1.06	\$38.88	0.2
	CSX	Casey, IL	Mobile, AL	Private	\$3,646	\$0.00	\$3,646.00	\$0.99	\$36.21	3.7
	CSX	Marion, OH	Chesapeake, VA	Private	\$3,214	\$0.00	\$3,214.00	\$0.87	\$31.92	2.6
	UP	Canton, KS	Houston, TX	Railroad	\$3,650	\$253.98	\$3,903.98	\$1.06	\$38.77	-27.9
	UP	Cozad, NE	Kalama, WA	Railroad	\$5,140	\$531.08	\$5,671.08	\$1.53	\$56.32	-15.2
	UP	Cozad, NE	Houston, TX	Railroad	\$4,010	\$366.52	\$4,376.52	\$1.18	\$43.46	-25.7
	UP	Sloan, IA	Ama, LA	Railroad	\$4,090	\$418.54	\$4,508.54	\$1.22	\$44.77	-25.1

Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge. For mileage calculations, BNSF Railway (BNSF) uses “Seattle, WA” for all Pacific Northwest (PNW) locations and “Houston, TX” for all Texas Gulf locations. CN = Canadian National Railway. CPKC = Canadian Pacific Kansas City. CSX = CSX Transportation. UP = Union Pacific Railroad. n/a = not available. A larger dataset (with additional routes, calculations, and shipment characteristics) is available on [AgTransport](#). Source: BNSF, CN, CPKC, CSX, and UP.

Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, September 2025

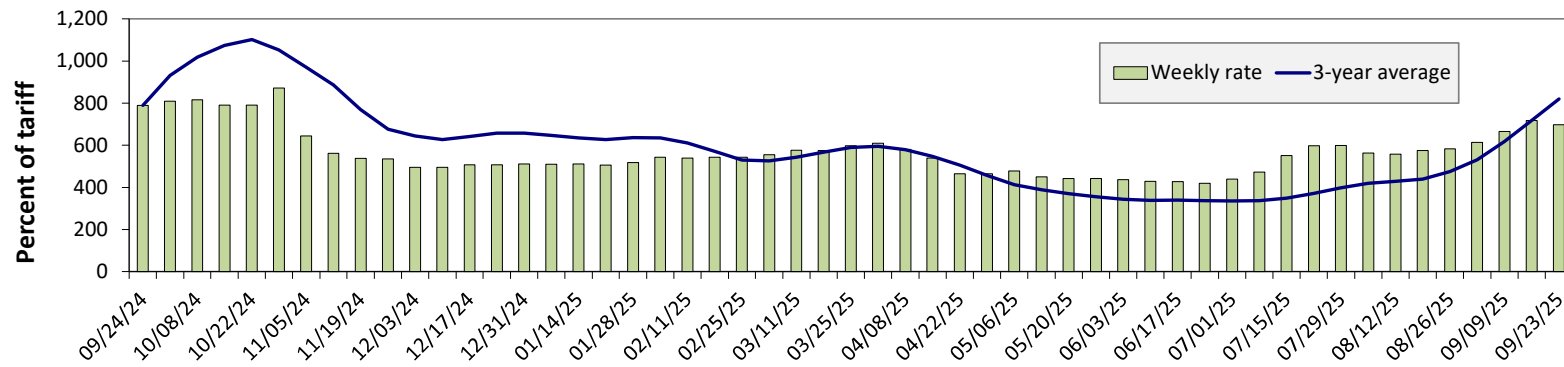
Commodity	US origin	US border city	US railroad	Train type	US rate plus fuel surcharge per car (USD)	US tariff rate + fuel surcharge per metric ton (USD)	US tariff rate + fuel surcharge per bushel (USD)	Percent M/M	Percent Y/Y
Corn	Adair, IL	El Paso, TX	BNSF	Shuttle	\$4,701	\$46.27	\$1.18	1.1	5.6
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	\$5,607	\$55.18	\$1.40	0.9	1.8
	Council Bluffs, IA	Laredo, TX	CPKC	Non-shuttle	\$6,133	\$60.36	\$1.53	0.9	1.6
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,508	\$54.21	\$1.38	0.9	1.8
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	\$5,724	\$56.34	\$1.43	0.9	1.7
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	\$5,119	\$50.38	\$1.28	1.0	5.5
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	\$5,256	\$51.73	\$1.31	1.0	5.4
Soybeans	Superior, NE	El Paso, TX	BNSF	Shuttle	\$5,111	\$50.30	\$1.28	0.8	5.4
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	\$5,607	\$55.18	\$1.50	0.9	1.8
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	\$4,445	\$43.75	\$1.19	-17.7	-19.0
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	\$5,363	\$52.78	\$1.44	-18.9	-19.7
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	\$4,444	\$43.74	\$1.19	-17.7	-19.0
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,508	\$54.21	\$1.48	0.9	1.8
Wheat	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	\$5,468	\$53.82	\$1.46	-18.6	-19.4
	FT Worth, TX	El Paso, TX	BNSF	DET	\$3,086	\$30.37	\$0.83	1.0	-25.7
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	\$2,886	\$28.40	\$0.77	1.1	-22.4
	Great Bend, KS	Laredo, TX	UP	Shuttle	\$4,409	\$43.39	\$1.18	0.8	-9.0
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,508	\$54.21	\$1.48	0.9	1.8
	Wichita, KS	Laredo, TX	UP	Shuttle	\$4,297	\$42.29	\$1.15	0.8	-7.1

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 Kansas City Southern (KCS) (now 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 2025: \$0.22/mile, up 4 cents from last month's surcharge of \$0.18/mile; up 2 cents from the September 2024 surcharge of \$0.2/mile; and down 9 cents from the September prior 3-year average of \$0.31/mile.

Figure 10. Illinois River barge freight rate



For the week ending September 23: 3 percent lower than the previous week; 12 percent lower than last year; and 15 percent lower 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	9/23/2025	709	703	697	619	681	622
	9/16/2025	709	714	717	615	675	600
\$/ton	9/23/2025	43.89	37.40	32.34	24.70	31.94	19.53
	9/16/2025	43.89	37.98	33.27	24.54	31.66	18.84
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	-3	-9	-12	-16	-15	-14
	3-year avg.	-13	-15	-15	-27	-21	-31
Rate	October	778	761	750	696	747	689
	December	0	133	572	465	529	423

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](#).

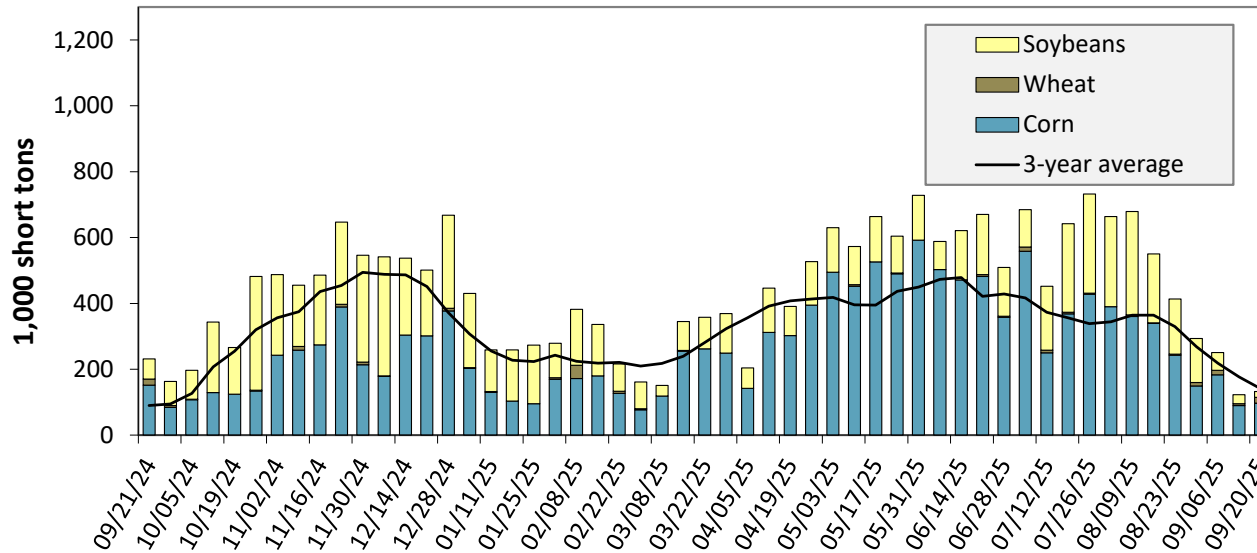
Source: USDA, Agricultural Marketing Service.

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 20:
43 percent lower than last year and 7
percent lower than the 3-year average.

Note: The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers.

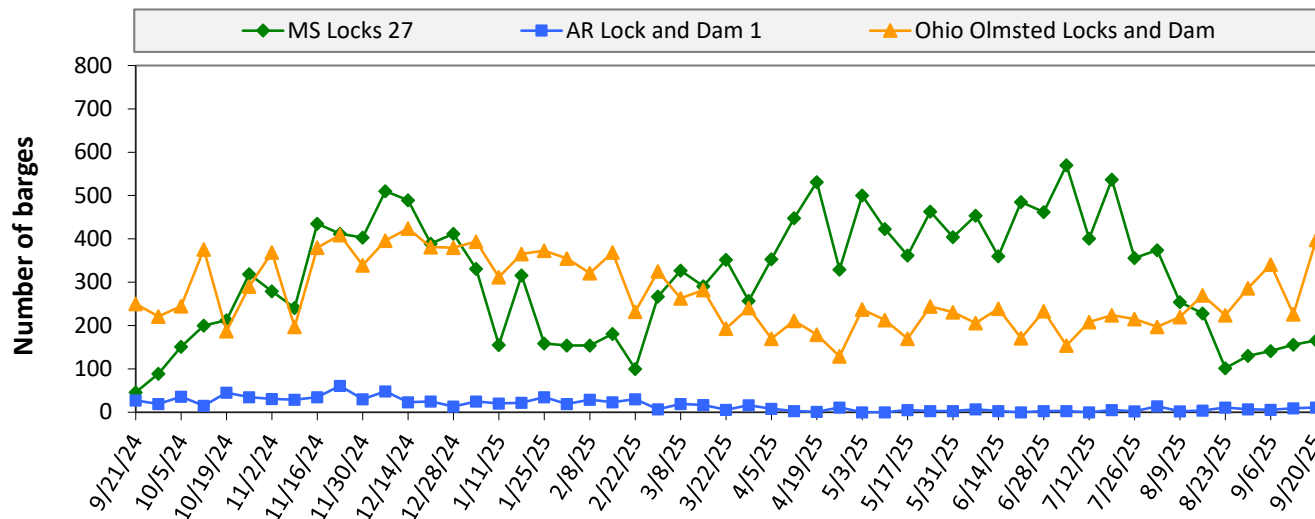
Table 10. Barged grain movements (1,000 tons)

For the week ending 09/20/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	27	2	3	0	32
Mississippi River (Winfield, MO (L25))	89	21	14	5	129
Mississippi River (Alton, IL (L26))	90	18	16	5	128
Mississippi River (Granite City, IL (L27))	97	18	17	5	136
Illinois River (La Grange)	24	0	3	0	27
Ohio River (Olmsted)	48	4	29	5	85
Arkansas River (L1)	17	14	8	0	39
Weekly total - 2025	161	35	54	10	261
Weekly total - 2024	333	35	134	0	502
2025 YTD	14,345	1,051	7,730	144	23,269
2024 YTD	10,848	1,338	7,337	170	19,693
2025 as % of 2024 YTD	132	79	105	85	118
Last 4 weeks as % of 2024	66	107	74	251	72
Total 2024	15,251	1,564	12,598	214	29,626

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.

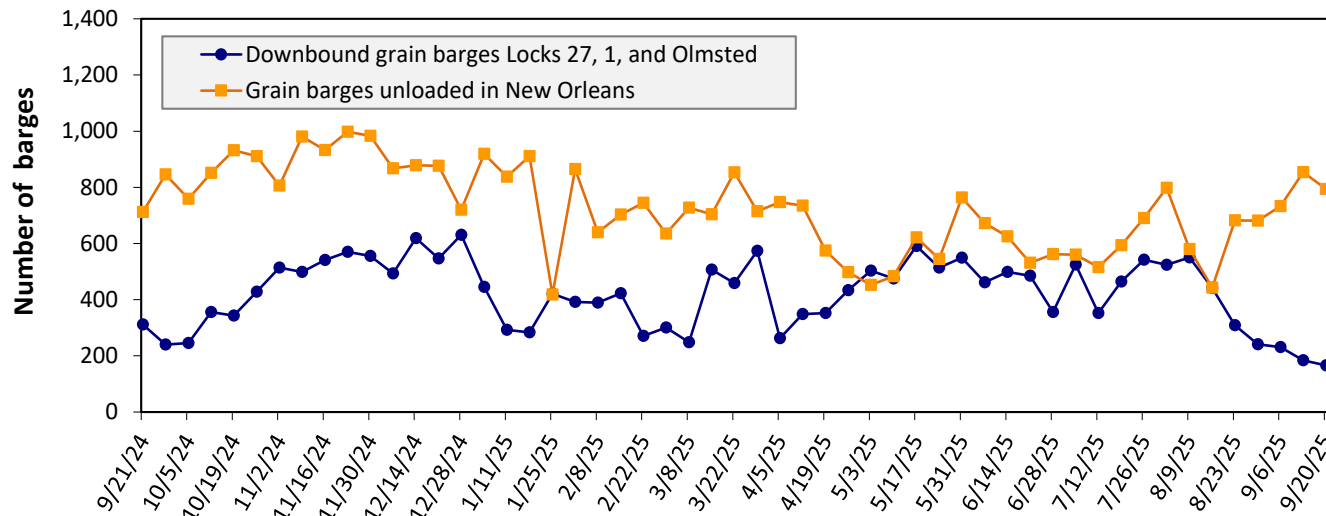
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending September 20: 575 barges transited the locks, 184 barges more than the previous week, and 44 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 20: 166 barges moved down river, 18 fewer than the previous week; 794 grain barges unloaded in the New Orleans Region, 7 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	
		September 2025	August 2025	September 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$23.18	\$23.06	\$21.87	6.0	5.6
	Central Ferry, WA/Almota, WA	\$22.25	\$22.13	\$20.97	6.1	5.5
	Lyons Ferry, WA	\$21.20	\$21.08	\$19.96	6.2	5.3
	Windust, WA/Lower Monumental, WA	\$20.13	\$20.01	\$18.93	6.3	5.2
	Sheffler, WA	\$20.10	\$19.98	\$18.90	6.3	5.2
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$18.86	\$18.74	\$17.70	6.6	5.0
	Port Kelly, WA/Wallula, WA	\$18.63	\$18.51	\$17.48	6.6	4.9
	Umatilla, OR	\$18.53	\$18.41	\$17.38	6.6	4.9
	Boardman, OR/Hogue Warner, OR	\$18.26	\$18.14	\$17.12	6.7	4.9
	Arlington, OR/Roosevelt, WA	\$18.10	\$17.98	\$16.96	6.7	4.9
	Biggs, OR	\$16.72	\$16.60	\$15.63	7.0	4.6
	The Dalles, OR	\$15.58	\$15.46	\$14.53	7.2	4.3

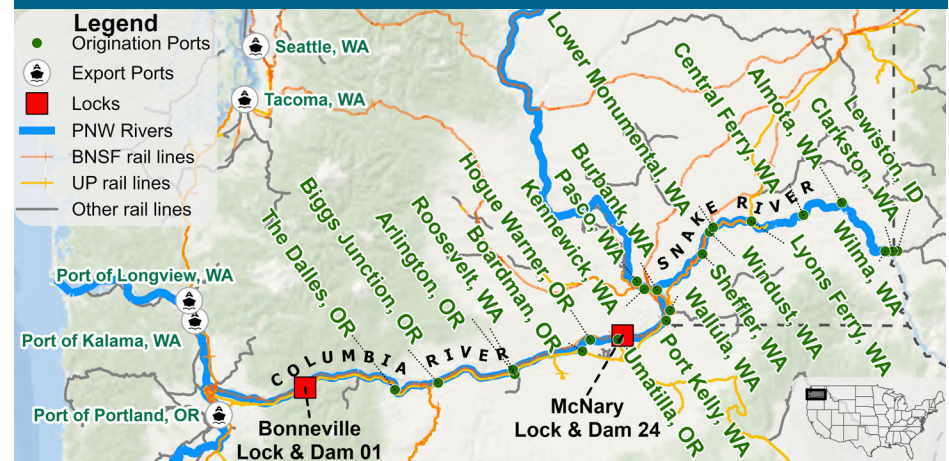
Note: Destination is Portland, OR, or Vancouver, WA; ton = 2,000 pounds; n/a = data not available.
Source: USDA, Agricultural Marketing Service.

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

August, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	353	0	353
Columbia River (Bonneville Lock and Dam (L1))	421	0	421
Monthly total 2025	421	0	421
Monthly total 2024	421	0	421
2025 YTD	2,629	0	2,629
2024 YTD	2,161	0	2,161

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.

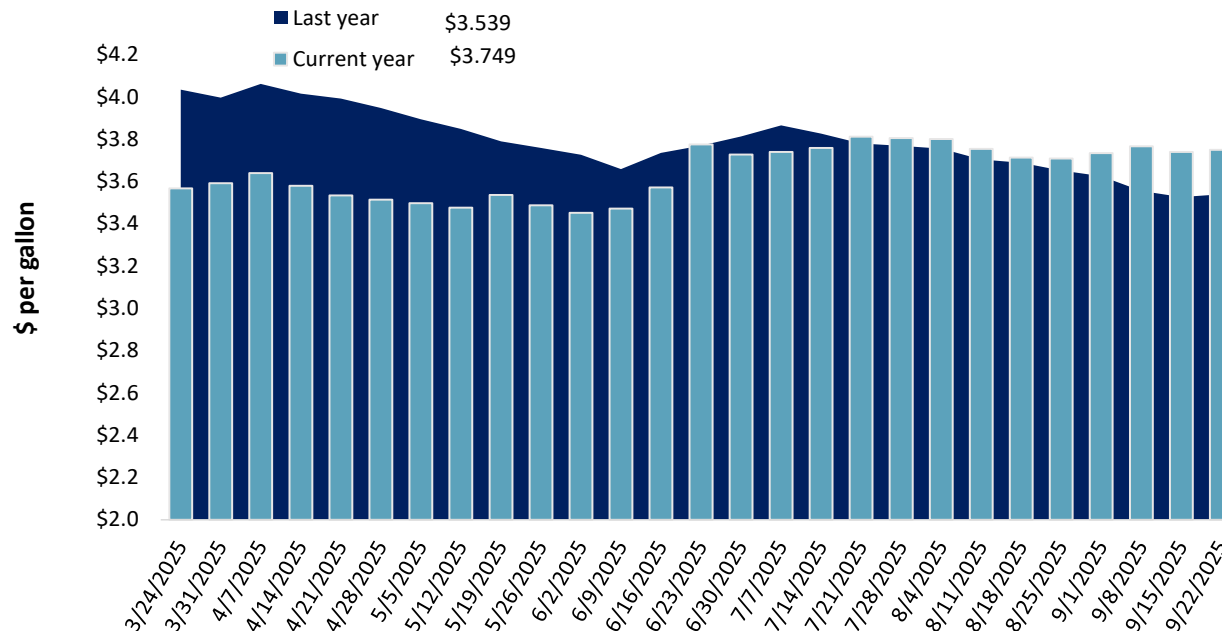
Table 13. Retail on-highway diesel prices, week ending 09/22/2025 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.745	-0.003	0.168
	New England	3.962	0.001	0.165
	Central Atlantic	3.908	-0.012	0.095
	Lower Atlantic	3.664	0.001	0.197
II	Midwest	3.731	0.021	0.220
III	Gulf Coast	3.400	0.011	0.209
IV	Rocky Mountain	3.747	0.025	0.139
V	West Coast	4.524	0.001	0.285
	West Coast less California	4.123	-0.011	0.308
	California	4.985	0.014	0.258
Total	United States	3.749	0.010	0.210

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 22, the U.S. average diesel fuel price increased 1.0 cent from the previous week to \$3.749 per gallon, 21.0 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 9/11/2025	2,275	651	1,311	1,135	104	5,477	21,590	9,207	36,273
	This week year ago	964	640	1,431	1,136	57	4,228	13,077	15,232	32,538
	Last 4 wks. as % of same period 2024/25	255	112	100	111	153	141	94	34	72
Current shipped (cumulative) exports sales	2025/26 YTD	3,036	1,192	1,948	1,329	118	7,624	2,243	1,071	10,938
	2024/25YTD	1,552	1,144	2,226	1,613	107	6,641	1,132	761	8,533
	YTD 2025/26 as % of 2024/25	196	104	88	82	110	115	198	141	128
	Total 2024/25	5,377	3,106	6,560	5,730	335	21,107	69,081	50,106	140,295
	Total 2023/24	3,535	4,260	6,314	3,906	526	18,540	54,277	44,510	117,328

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

Source: USDA, Foreign Agricultural Service.

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

For the week ending 9/11/2025	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2022-24 (1,000 mt)
	YTD MY 2025/26	YTD MY 2024/25		
Mexico	8,023	7,015	14	19,839
Japan	2,878	1,556	85	10,478
Colombia	1,673	850	97	5,493
Korea	1,437	152	847	3,127
Taiwan	497	145	244	1,429
Top 5 importers	14,507	9,717	49	40,367
Total U.S. corn export sales	23,833	14,209	68	54,276
% of YTD current month's export projection	32%	20%	-	-
Change from prior week	1,232	847	-	-
Top 5 importers' share of U.S. corn export sales	61%	68%	-	74%
USDA forecast September 2025	75,569	71,886	5	-
Corn use for ethanol USDA forecast, September 2025	142,240	138,938	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 9/11/2025	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2022-24 (1,000 mt)
	YTD MY 2025/26	YTD MY 2024/25		
China	0	5,943	-100	26,078
Mexico	2,200	1,326	66	4,762
Japan	428	479	-11	2,107
Egypt	505	440	15	2,098
Indonesia	392	457	-14	1,997
Top 5 importers	3,525	8,644	-59	37,042
Total U.S. soybean export sales	10,277	15,993	-36	48,941
% of YTD current month's export projection	22%	31%	-	-
Change from prior week	923	1,748	-	-
Top 5 importers' share of U.S. soybean export sales	34%	54%	-	76%
USDA forecast, September 2025	45,858	51,029	-10	-

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 9/11/2025	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2022-24 (1,000 mt)
	YTD MY 2025/26	YTD MY 2024/25		
Mexico	2,248	1,831	23	3,358
Philippines	1,448	1,482	-2	2,473
Japan	953	910	5	2,045
China	0	139	-100	1,137
Korea	874	1,070	-18	1,674
Taiwan	492	558	-12	935
Thailand	300	350	-14	667
Nigeria	938	225	318	629
Indonesia	663	442	50	518
Colombia	372	244	53	489
Top 10 importers	8,287	7,250	14	13,926
Total U.S. wheat export sales	13,101	10,870	21	19,135
% of YTD current month's export projection	53%	48%	-	-
Change from prior week	378	217	-	-
Top 10 importers' share of U.S. wheat export sales	63%	67%	-	73%
USDA forecast, September 2025	24,494	22,480	9	-

Note: The top 10 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2024/25 (June 1 – May 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments' change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales. In rightmost column, "Exports" = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.

Source: USDA, Foreign Agricultural Service.

Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

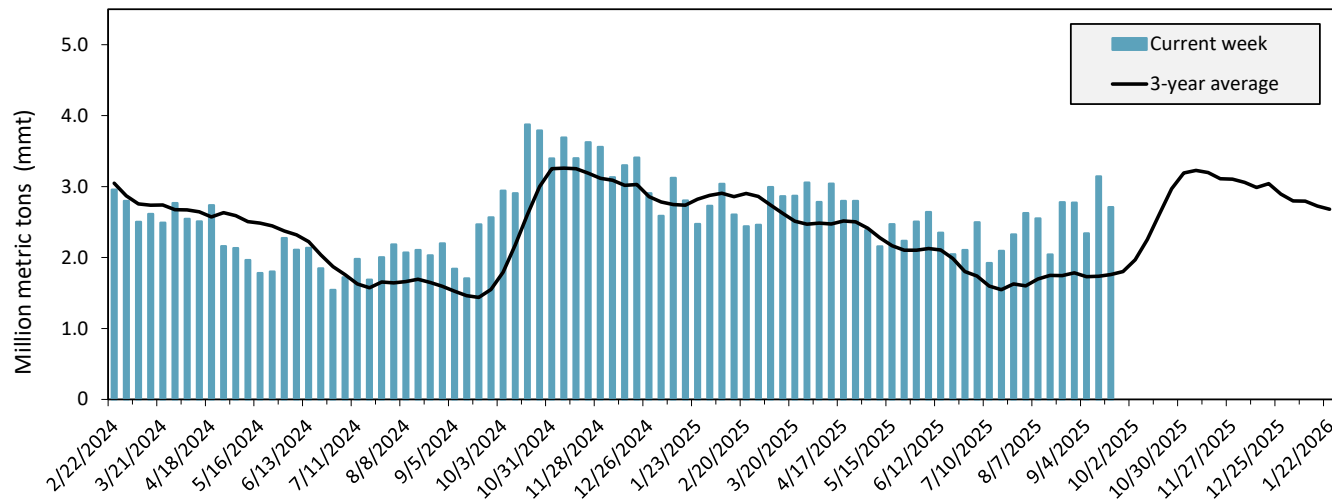
Port regions	Commodity	For the week ending 09/18/2025	Previous week*	Current week as % of previous	2025 YTD*	2024 YTD*	2025 YTD as % of 2024 YTD	Last 4-weeks as % of:		2024 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	128	193	66	16,501	11,711	141	614	912	13,987
	Soybeans	0	0	n/a	1,966	2,735	72	0	0	10,445
	Wheat	485	432	112	8,636	8,633	100	98	110	11,453
	All grain	614	625	98	27,219	24,164	113	130	147	37,186
Mississippi Gulf	Corn	747	956	78	27,096	19,530	139	151	193	27,407
	Soybeans	420	684	61	14,403	14,076	102	152	145	29,741
	Wheat	127	53	240	3,136	3,782	83	116	122	4,523
	All grain	1,293	1,692	76	44,676	37,507	119	145	166	61,789
Texas Gulf	Corn	62	18	345	474	404	117	313	483	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	122	173	71	3,526	1,422	248	199	208	1,940
	All grain	215	227	95	4,649	4,541	102	150	165	6,965
Interior	Corn	298	302	99	10,597	10,069	105	110	145	13,463
	Soybeans	63	136	46	4,909	5,061	97	114	145	8,059
	Wheat	88	99	89	2,399	2,312	104	91	105	2,989
	All grain	461	553	83	18,267	17,621	104	107	136	24,791
Great Lakes	Corn	40	42	96	147	0	n/a	n/a	-	271
	Soybeans	0	0	n/a	0	18	0	n/a	n/a	136
	Wheat	31	0	n/a	225	385	58	64	84	653
	All grain	72	42	170	371	403	92	153	167	1,060
Atlantic	Corn	53	2	n/a	301	224	134	504	467	410
	Soybeans	2	2	93	501	441	114	657	76	1,272
	Wheat	1	0	n/a	54	66	82	68	24	73
	All grain	56	4	n/a	856	732	117	423	202	1,754
All Regions	Corn	1,329	1,513	88	55,116	41,938	131	161	209	56,109
	Soybeans	484	822	59	21,990	22,385	98	131	132	50,865
	Wheat	854	756	113	17,976	16,600	108	109	121	21,631
	All grain	2,710	3,144	86	96,142	85,021	113	134	156	134,016

*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 2024, approximately 48 percent of the U.S. export grain shipments departed through the U.S. Gulf region and 27 percent departed through the PNW.

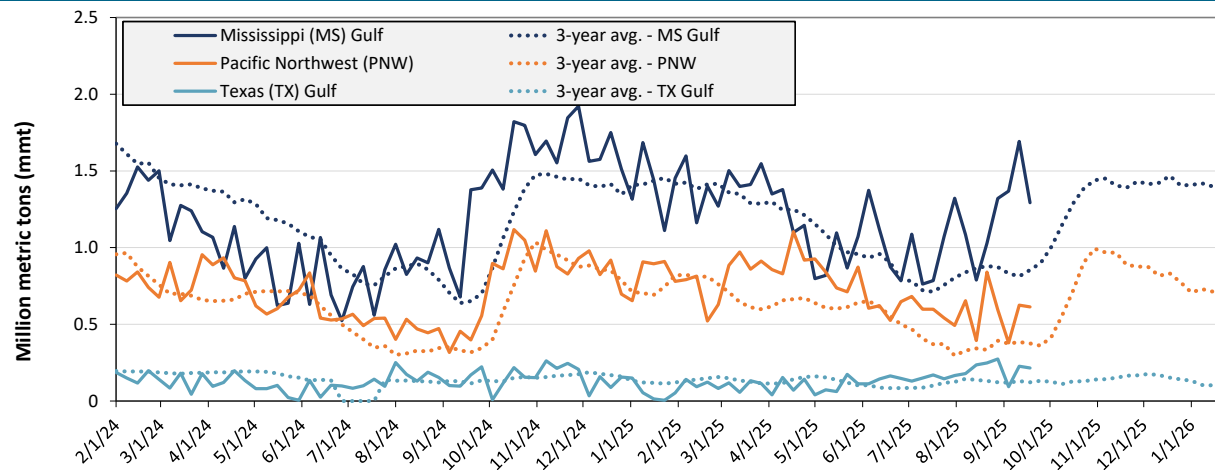
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Sep. 18: 2.7 mmt of grain inspected, down 14 percent from the previous week, up 27 percent from the same week last year, and up 54 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 09/18/25 inspections (mmt):

MS Gulf: 1.29

PNW: 0.61

TX Gulf: 0.22

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 24	down 5	down 21	down 2
Last year (same 7 days)	up 28	up 58	up 32	up 35
3-year average (4-week moving average)	up 51	up 75	up 54	up 64

Source: USDA, Federal Grain Inspection Service.

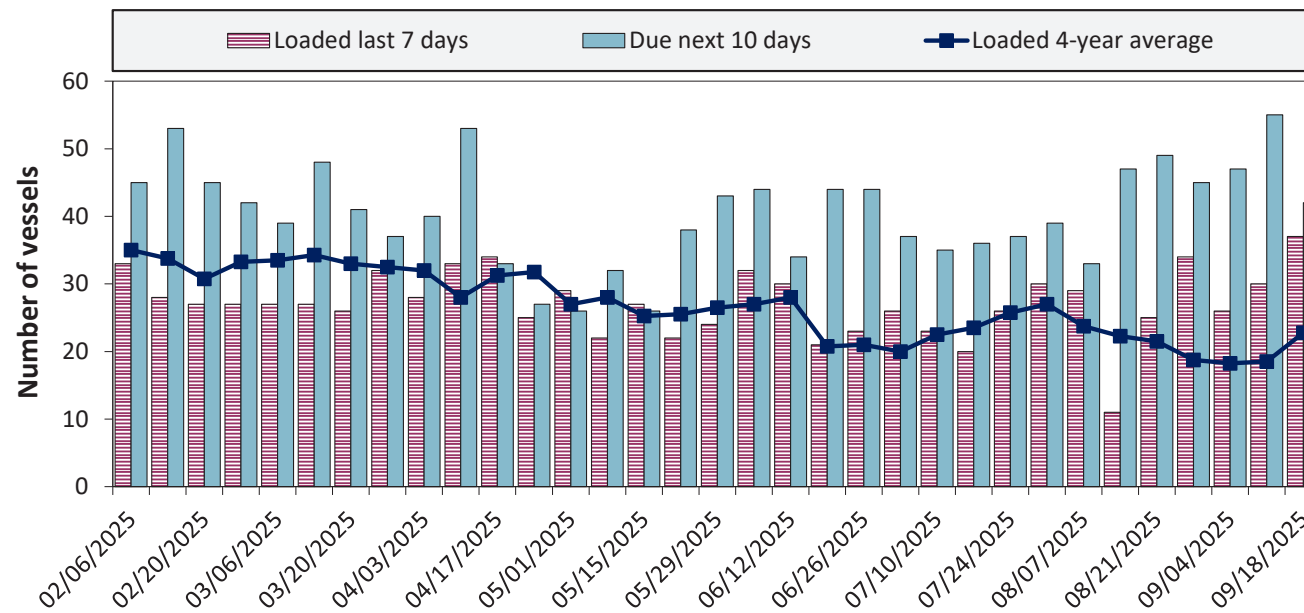
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
9/18/2025	22	37	42	14
9/11/2025	27	30	55	13
2024 range	(11...45)	(18...38)	(29...61)	(3...25)
2024 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

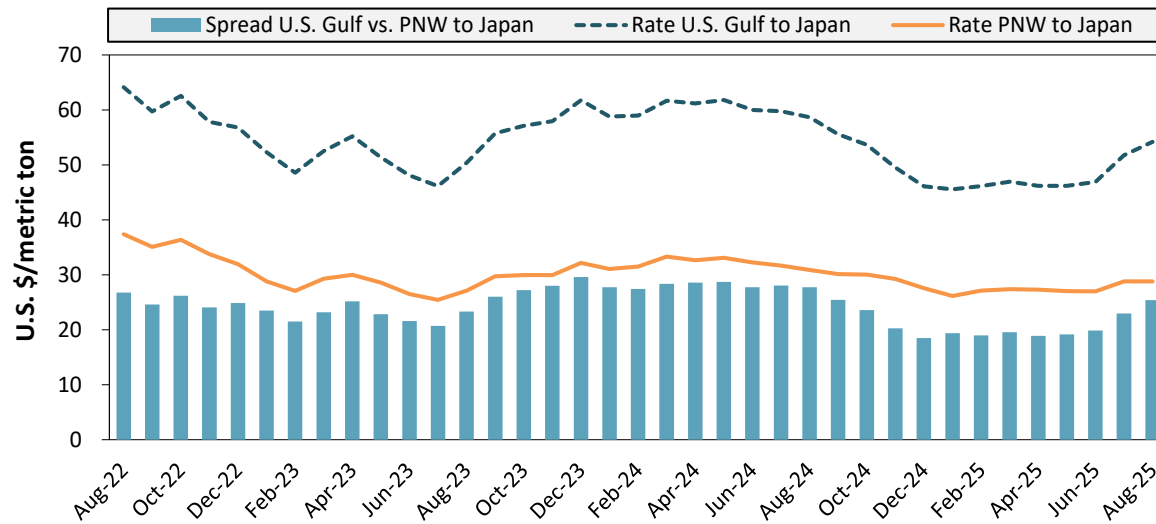


Week ending 09/18/25, number of vessels	Loaded	Due
Change from last year	48%	-14%
Change from 4-year average	63%	-9%

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.

Ocean rates	U.S. Gulf	PNW	Spread
August 2025	\$54.19	\$28.81	\$25.38
Change from August 2024	-8%	-7%	-6%
Change from 4-year average	-15%	-17%	-11%

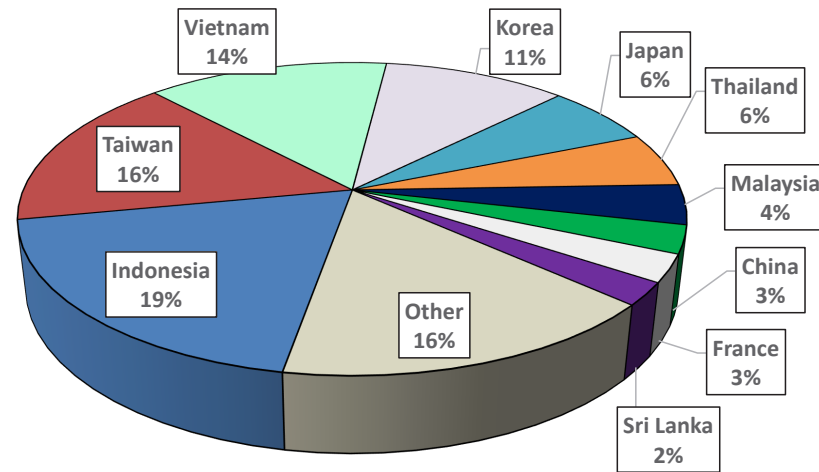
Table 20. Ocean freight rates for selected shipments, week ending 9/20/2025

Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	S. Korea	Heavy grain	Aug 12, 2025	Oct 1/10, 2025	58,000	63.75
U.S. Gulf	S. Korea	Heavy grain	Aug 7, 2025	Sep 1/10, 2025	58,000	62.50
U.S. Gulf	S. Korea	Heavy grain	Jun 23, 2025	Jul 1/10, 2025	58,000	55.50
U.S. Gulf	Morocco	Soybeans	May 23, 2025	Jun 5/15, 2025	46,000	42.38
U.S. Gulf	Indonesia	Soybeans	Sep 17, 2025	Oct 15/Nov 5, 2025	68,000	50.50
PNW	Taiwan	Wheat	Sep 03, 2025	Nov 1/10, 2025	46,000	49.00
PNW	Taiwan	Wheat	Aug 28, 2025	Oct 1/10, 2025	46,000	48.00
PNW	Taiwan	Wheat	Jul 23, 2025	Sep 1/10, 2025	45,000	46.75
EC S. America	China	Heavy grain	May 16, 2025	Jun 12/22, 2025	80,000	33.40
Brazil	N. China	Heavy grain	Jul 25, 2025	Aug 24/30, 2025	66,000	40.00
Brazil	N. China	Heavy grain	Jul 16, 2025	Aug 14/20, 2025	66,000	49.00
Brazil	N. China	Heavy grain	Jul 15, 2025	Aug 14/20, 2025	66,000	49.00
Brazil	N. China	Heavy grain	Jul 14, 2025	Aug 14/20, 2025	66,000	49.00
Brazil	China	Heavy grain	Jul 10, 2025	Aug 5/15, 2025	64,000	40.00
Brazil	China	Heavy grain	Jun 23, 2025	Jul 11/15, 2025	63,000	34.75

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

In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined for Asia.

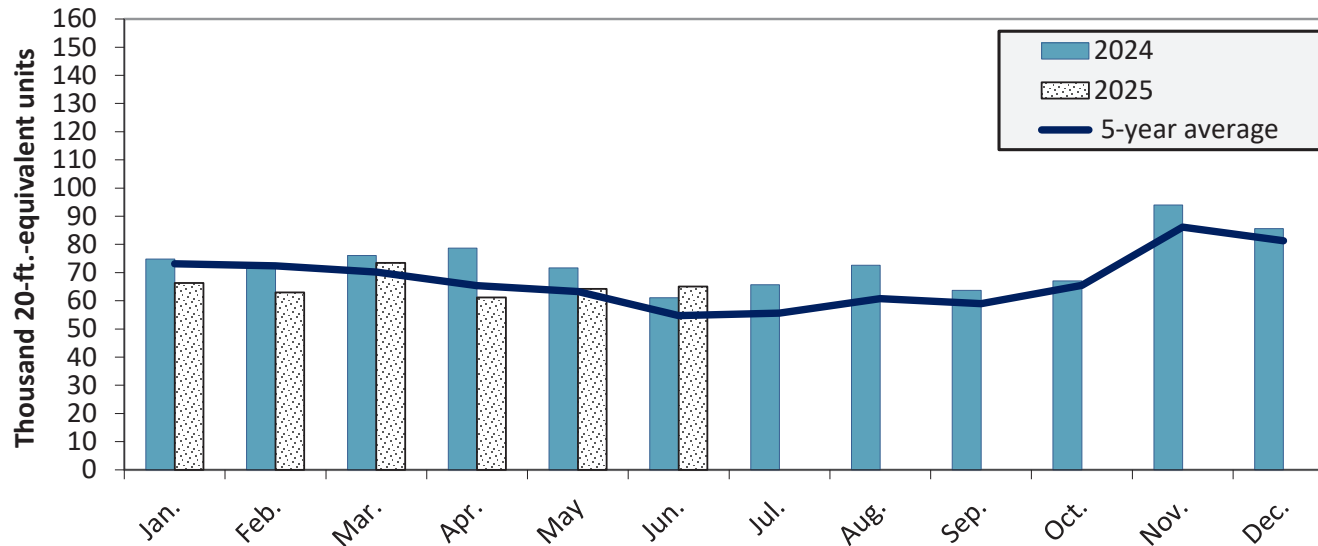
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-June 2025



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 June 2025 were up 6.5 percent from last year and up 18.8 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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