



Grain Transportation Report

Contents

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

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Extreme Cold Challenges Barge Movements on MRS. With [record cold temperatures](#) throughout much of the Midwest, ice accumulation on the Mississippi River System (MRS) has [challenged barge operations](#) since the start of December.

Since barge navigation on the Upper Mississippi River (UMR) ended on November 25 ([Grain Transportation Report \(GTR\), December 4, 2025, second highlight](#)), ice formation has slowed navigation on the Illinois River. According to the American Commercial Barge Line, barges on the Illinois River have required [ice couplings](#) since December 5. The warmer temperatures of recent days are expected to melt some of the ice.

Ice formation on the UMR and Illinois River contributes to low water on the Lower Mississippi River (LMR), where water levels have been near the “low” threshold since September ([GTR, September 25, 2025](#)). The Mississippi River at [St. Louis](#) currently measures -3.2 feet, just above the threshold. One operator, the [American Commercial Barge Line](#), has implemented draft and tow-size restrictions on the LMR, but the U.S. Coast Guard has no low water restrictions currently in effect.

Historic Flooding Impacts BNSF Operations in PNW. Last week, December 8-11, an [atmospheric river](#) brought heavy rainfall to western Oregon and Washington State—between 10 and 17 inches, in some areas.

In five locations in western Washington, river levels set new records. This week, additional rain in the region has [exacerbated flooding](#).

As a result of the flooding, multiple [BNSF Railway](#) subdivisions were out of service last weekend—including the Scenic and Stampede Subdivisions (both in Washington State), which provide access to grain export terminals on Puget Sound. Both subdivisions have since [reopened](#). BNSF’s Seattle Subdivision—which serves grain elevators on the Columbia River—never closed, though BNSF closely monitored the route for flooding.

The Pacific Northwest (PNW) is the second-largest gateway for U.S. grain exports. Over the last 4 weeks, grain export inspections from PNW export terminals have been 8 percent above the prior 3-year average ([GTR table 18](#)).

Iowa Waives Hours-of-Service Rules for Hauling Heating Products. On December 4, the Governor of Iowa [issued an executive order](#) waiving hours-of-service (HOS) regulations for drivers hauling propane, heating oil, natural gas, and other fuels until January 3.

Reasons for issuing the order include high demand for heating products throughout the Midwest, and a disrupted segment of pipeline affecting heating-fuel distribution terminals in Iowa and elsewhere in the Midwest.

Despite waiving HOS rules, the order stipulates motor carriers should not allow an ill or fatigued driver to operate a motor vehicle. Likewise, a driver who notifies a motor carrier that he or she needs immediate rest must be given at least 10 consecutive off-duty hours before returning to drive.



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 November 27, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2025/26 totaled 40.93 million metric tons (mmt), up 1 percent from the week ending November 20 and down 3 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26 were 1.79 mmt, down 3 percent from the week ending November 20. Net [soybean export sales](#) were 1.11 mmt, down 52 percent from the week ending November 20. Net [wheat export sales](#) were 0.46 mmt, up 27 percent from the week ending November 20.

Rail

U.S. Class I railroads originated 30,712 [grain carloads](#) during the week ending December 6. This was a 20-percent increase from the previous week, 7 percent more than last year, and 9 percent more than the 3-year average.

Average December [shuttle secondary railcar bids/offers](#) (per car) were \$379 above tariff for the week ending December 11. This was \$63 less than last week and \$539 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$25 below tariff. This was \$188 less than last week and \$50 lower than this week last year.

Barge

For the week ending December 13, [barged grain movements](#) totaled 887,800 tons. This was 62 percent more than the previous week and down 2 percent from the same period last

year.

For the week ending December 13, 561 grain barges [moved down river](#)—222 more than last week. There were 674 grain barges [unloaded](#) in the New Orleans region, 24 percent less than last week.

Ocean

For the week ending December 11, 27 [oceangoing grain vessels](#) were loaded in the Gulf—23 percent fewer than the same period last year. Within the next 10 days (starting December 12), 43 vessels were expected to be loaded—17 percent fewer than the same period last year.

As of December 11, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$56.00, down 2 percent from the previous week. The rate from the Pacific Northwest to Japan was \$29.50 per mt, down 1 percent from the previous week.

Fuel

For the week ending December 15, the [U.S. average diesel fuel price](#) decreased 5.8 cents from the previous week to \$3.607 per gallon, 11.3 cents above the same week last year.



Landed Costs of Grain to Mexico Fell From Second to Third Quarter 2025

Mexico is a long-time major importer of U.S. grain. The competitiveness of U.S. grain (corn, soybeans, and wheat) exports to Mexico and elsewhere depends on low transportation and

landed costs. U.S. grain is transported to Mexico, either across the land border or by sea to Mexican ports for inland distribution. This article examines the costs of transporting U.S.

grain to Mexico over land to various U.S.-Mexico border locations (land route) and by sea to Veracruz (water route),¹ tracking changes over time (table 1).

Table 1. Quarterly costs of transporting U.S. grain to Veracruz, Mexico, and U.S.-Mexico border locations

Type of Cost	Water route (to Veracruz) \$/metric ton					Land route (to U.S.-Mexico border locations) \$/metric ton				
	2024 3rd qtr.	2025 2nd qtr.	2025 3rd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2024 3rd qtr.	2025 2nd qtr.	2025 3rd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	CORN									
	Illinois origin					Iowa origin				
Truck	17.67	18.07	17.35	-1.8	-4.0	6.84	6.49	6.98	2.0	7.6
Rail	-	-	-	-	-	59.37	59.84	59.85	0.8	0.0
Barge	27.21	24.29	30.28	11.3	24.7	-	-	-	-	-
Ocean	16.52	13.35	15.64	-5.3	17.2	-	-	-	-	-
Total transportation cost	61.40	55.71	63.27	3.0	13.6	66.21	66.33	66.83	0.9	0.8
Farm value	153.14	180.44	160.36	4.7	-11.1	163.11	180.31	157.34	-3.5	-12.7
Landed cost	214.54	236.15	223.63	4.2	-5.3	229.32	246.64	224.17	-2.2	-9.1
Transport % of landed cost	29	24	28	0	5	29	27	30	1	3

Type of Cost	Water route (to Veracruz) \$/metric ton					Land route (to U.S.-Mexico border locations) \$/metric ton				
	2024 3rd qtr.	2025 2nd qtr.	2025 3rd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2024 3rd qtr.	2025 2nd qtr.	2025 3rd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	SOYBEANS									
	Illinois origin					Missouri origin				
Truck	17.67	18.07	17.35	-1.8	-4.0	6.84	6.49	6.98	2.0	7.6
Rail	-	-	-	-	-	53.91	53.41	49.95	-7.3	-6.5
Barge	27.21	24.29	30.28	11.3	24.7	-	-	-	-	-
Ocean	16.52	13.35	15.64	-5.3	17.2	-	-	-	-	-
Total transportation cost	61.40	55.71	63.27	3.0	13.6	60.75	59.90	56.93	-6.3	-5.0
Farm value	396.83	388.26	376.01	-5.2	-3.2	388.26	384.58	372.70	-4.0	-3.1
Landed cost	458.23	443.97	439.28	-4.1	-1.1	449.01	444.48	429.63	-4.3	-3.3
Transport % of landed cost	13	13	14	1	2	14	13	13	0	0

table 1 continues on page 5

1 Starting this quarter, a different water route is used to calculate the costs of shipping wheat to Mexico. Before this quarter, the water-route costs were for Kansas hard red winter (HRW) wheat shipped by rail to the U.S. Gulf and then shipped by ocean vessel to Mexico. Starting this quarter, the water route reflects the costs to ship soft red winter (SRW) wheat by barge from Illinois to the U.S. Gulf and, from there, by ocean vessel to Mexico. According to USDA's Federal Grain Inspection Service (FGIS) data, the United States exported 3.9 million metric tons (mmt) of wheat to Mexico in 2024. Of that total, 39 percent was HRW wheat and 34 percent was SRW wheat. Over 90 percent of HRW wheat was shipped to Mexico overland, by rail. Of SRW wheat to Mexico, 52 percent was shipped by ocean vessel from New Orleans, LA.

Type of Cost	Water route (to Veracruz) \$/metric ton					Land route (to U.S.-Mexico border locations) \$/metric ton				
	2024 3rd qtr.	2025 2nd qtr.	2025 3rd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2024 3rd qtr.	2025 2nd qtr.	2025 3rd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	WHEAT									
	Illinois origin					Kansas origin				
Truck	17.67	18.07	17.35	-1.8	-4.0	6.84	6.49	6.98	2.0	7.6
Rail	-	-	-	-	-	45.40	44.07	41.96	-7.6	-4.8
Barge	21.02	15.31	21.16	0.7	38.2	-	-	-	-	-
Ocean	16.52	13.35	15.64	-5.3	17.2	-	-	-	-	-
Total transportation cost	55.21	46.73	54.15	-1.9	15.9	52.24	50.56	48.94	-6.3	-3.2
Farm value	189.11	200.25	179.06	-5.3	-10.6	195.23	183.96	164.73	-15.6	-10.5
Landed cost	244.32	246.98	233.21	-4.5	-5.6	247.47	234.52	213.67	-13.7	-8.9
Transport % of landed cost	23	19	23	1	4	21	22	23	2	1

Note: In 2022, because of tax changes in Mexico, all three Class I railroads that ship from the United States to Mexico (BNSF, Union Pacific, and Kansas City Southern) report rates only to the border for interchange. These rates are called "Rule 11 rates." The estimated total includes the estimated tariff through-rate for shuttle train service to U.S.-Mexico border locations and the reported fuel surcharge. The estimated rate does not include any additional costs for shuttle car service. Rates may be revised from what were previously published. Source for ocean freight rates: O'Neil Commodity Consulting. Source for farm values: USDA, National Agricultural Statistics Service. Landed cost is total transportation cost plus farm value. "-" indicates data not required or applicable. Total may not add exactly because of rounding.

Source: Compiled by USDA, Agricultural Marketing Service.

Quarter-to-quarter transportation costs.

From second quarter 2025 to third quarter 2025 (quarter to quarter), total transportation costs rose for all grain by water routes, reflecting increases in barge and ocean freight rates. Barge rates rose in response to reduced shipping capacity as [water levels sank to critical lows](#) in the Mississippi River. Rising ocean freight rates reflected strong movements of bulk items, especially imports of iron ore and coal by China and sustained demand for grain shipments out of the U.S. Gulf ([Grain Transportation Report \(GTR\), November 27, 2025](#)).

Also, quarter to quarter, total transportation costs fell for soybeans and wheat shipped by land routes, reflecting lower rail freight rates.

Railroads reduced wheat rail tariff rates in June ([GTR, June 26, 2025](#)) and soybean rail tariff rates in September ([GTR, September 4, 2025, second highlight](#)).

Year-to-year transportation costs. From third quarter 2024 to third quarter 2025 (year to year), total costs of shipping corn and soybeans to Mexico by the water route rose, because of higher barge rates. For water-route wheat, the decreases in truck and ocean freight rates outweighed the increase in barge rates, thereby lowering total transportation costs.²

Transportation costs increased for land-route corn, but fell for land-route soybeans and wheat because of falling rail tariffs.

Quarter-to-quarter landed costs. Quarter to quarter, landed costs fell for all grain shipped by water and land routes. For water-route grain, landed costs dropped because of declining farm values. For land-route soybeans and wheat, landed costs fell because of declines in both transportation costs and farm values. For land-route corn, landed costs fell because of declining farm values ([table 1](#) and [figs. 1 and 2](#)).

The share of landed costs comprising transportation ranged from 14 to 28 percent for the water routes and from 13 to 30 percent for the land routes. For water-route corn, soybeans, and wheat and for land-route corn, transportation's share of landed costs increased because of both rising transportation costs and

² Water routes typically involve truck transportation to barge to oceangoing vessel, or truck to rail to oceangoing vessel.

falling farm values. For land-route wheat, transportation's share of landed costs rose marginally as farm-value decreases exceeded transportation-cost decreases.

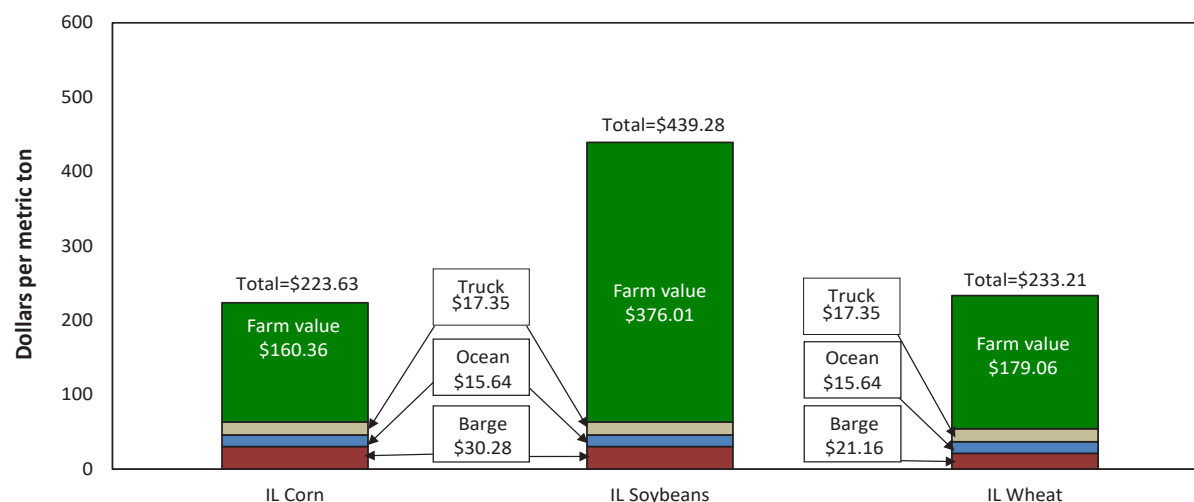
Year-to-year landed costs. Year to year, except for water-route corn, landed costs fell for all grains shipped to Mexico via both water and land routes. For land-route corn and water-route soybeans, landed costs fell because of lower farm values. In the cases of wheat by both routes and land-route soybeans, both lower transportation costs and lower farm values pushed down landed costs.

U.S. Exports to Mexico. According to [USDA's Foreign Agricultural Service's Global Agricultural Trade System \(GATS\) data](#), in third quarter 2025, the United States exported to Mexico 7.12 million metric tons (mmt) of corn; 1.45 mmt of soybeans; and 1.31 mmt of wheat—increases of 4 percent, 43 percent, and 28 percent quarter to quarter, respectively. Year to year, U.S. exports destined to Mexico were up 4 percent for corn, up 21 percent for soybeans, and up 20 percent for wheat.

According to the [GATS data](#), from January to September 2025, exports to Mexico were up 5 percent for corn, up 9 percent for soybeans, and up 15 percent for wheat from the same period last year.

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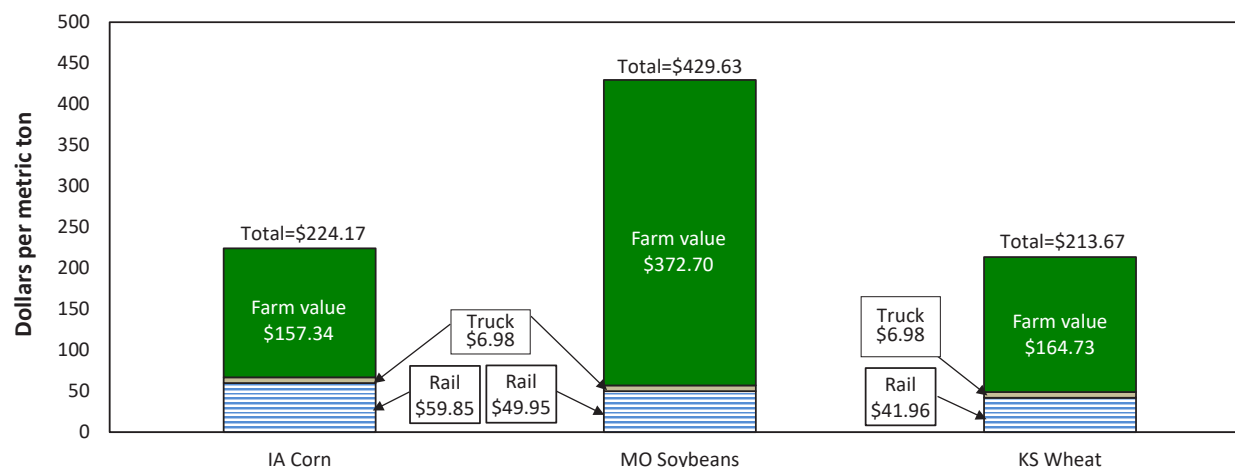
Figure 1. Third-quarter 2025 water-route landed costs to Veracruz, Mexico



Note: IL = Illinois.

Source: USDA, Agricultural Marketing Service.

Figure 2. Third-quarter 2025 land-route landed costs to U.S.-Mexico border locations



Note: IA = Iowa; MO = Missouri; KS = Kansas.

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 oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

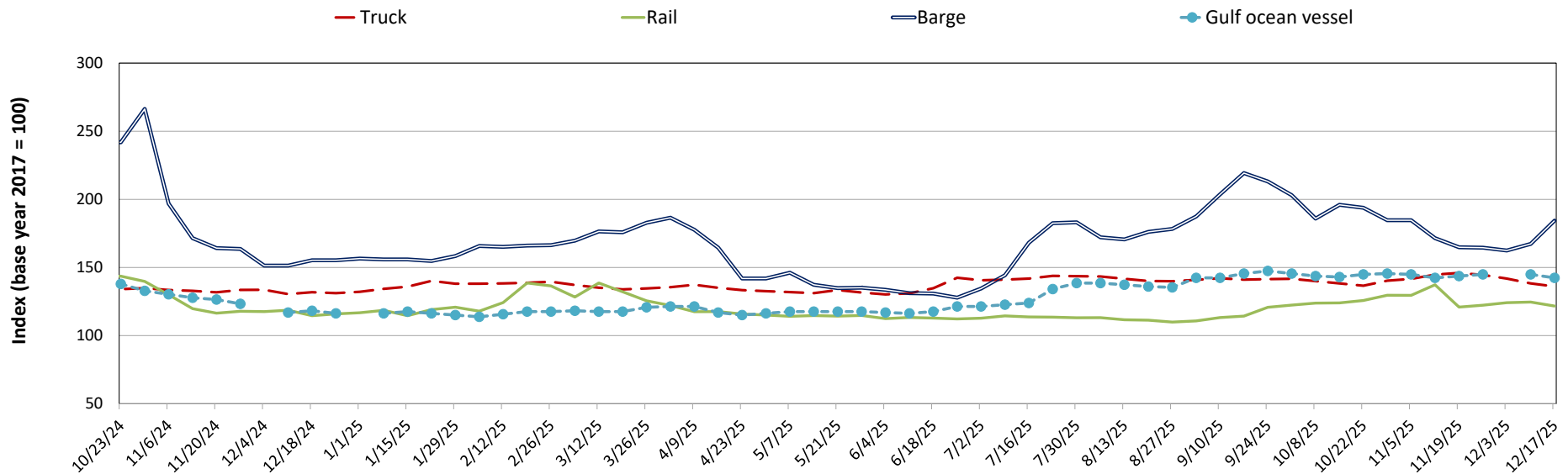
Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
12/17/25	136	122	184	142	140
12/10/25	138	125	167	145	141
12/18/24	132	115	155	118	132

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.

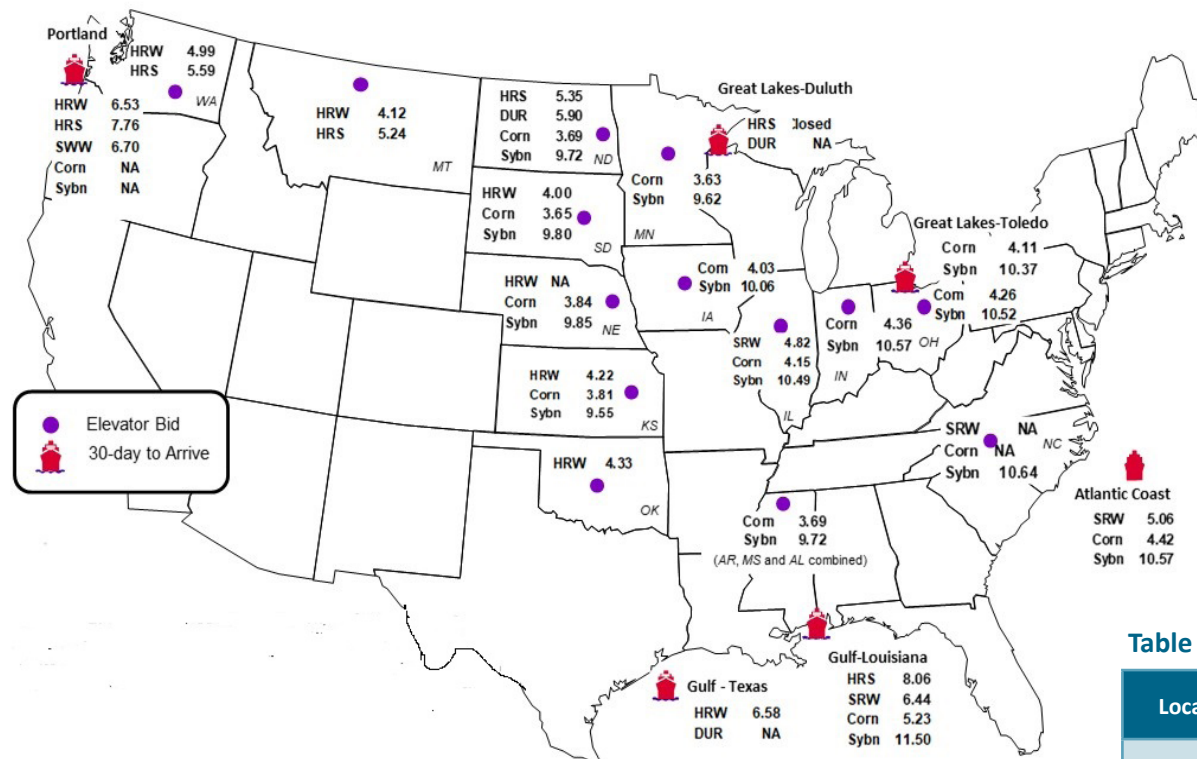
Figure 1. Grain transportation cost indicators as of week ending 12/17/25



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	12/12/2025	12/5/2025
Corn	IL-Gulf	-1.08	-1.08
Corn	NE-Gulf	-1.39	-1.38
Soybean	IA-Gulf	-1.44	-1.48
HRW	KS-Gulf	-2.36	-2.31
HRS	ND-Portland	-2.41	-2.24

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	12/12/2025	Week ago 12/5/2025	Year ago 12/13/2024
Kansas City	Wheat	Mar	5.142	5.310	5.624
Minneapolis	Wheat	Mar	5.750	5.730	5.984
Chicago	Wheat	Mar	5.254	5.358	5.556
Chicago	Corn	Mar	4.402	4.448	4.434
Chicago	Soybean	Mar	10.772	11.052	9.914

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.

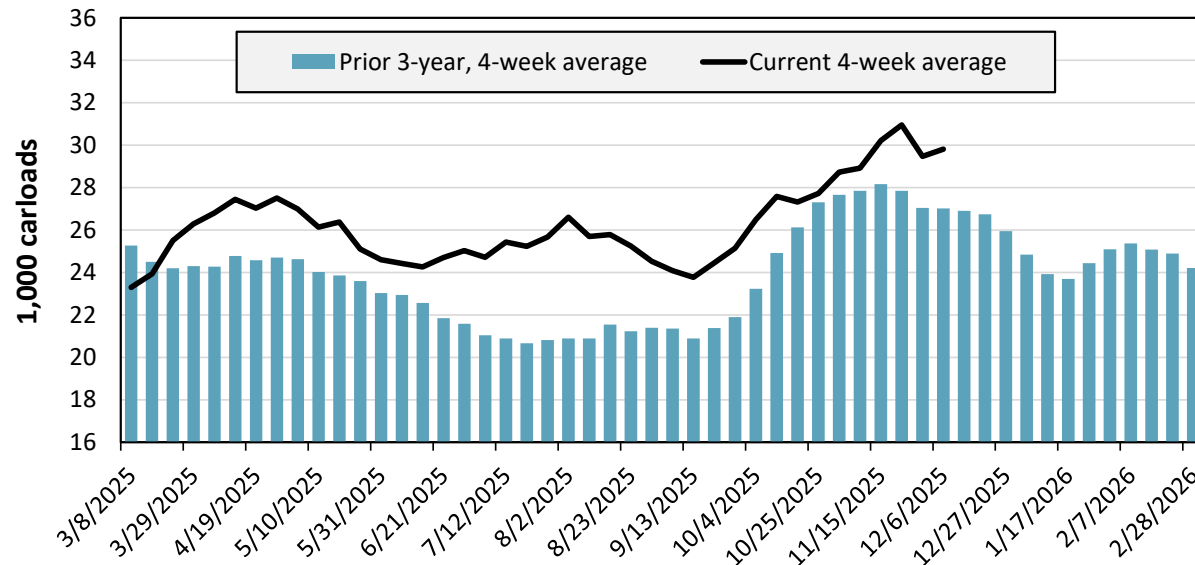
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 12/06/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,779	2,901	13,179	7,239	3,792	1,822	30,712
This week last year	2,367	3,328	11,395	6,053	3,608	1,891	28,642
2025 YTD	76,069	130,712	560,520	289,641	144,126	72,356	1,273,424
2024 YTD	83,136	134,276	525,403	259,799	133,872	54,571	1,191,057
2025 YTD as % of 2024 YTD	91	97	107	111	108	133	107
Last 4 weeks as % of 2024	88	87	121	107	117	109	110
Last 4 weeks as % of 3-yr. avg.	83	92	116	115	114	111	110
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 December 6, grain carloads were up 1 percent from the previous week, up 10 percent from last year, and up 10 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: 12/5/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	38.4	23.8	17.3	17.9	10.1	33.9	23.6
	Average over last 4 weeks	29.0	25.9	12.4	16.7	9.7	33.2	21.1
	Average of same 4 weeks last year	32.3	30.6	20.0	15.6	7.4	n/a	21.2
Average grain unit train speeds (miles per hour)	This week	23.8	19.5	25.1	23.8	24.0	19.4	22.6
	Average over last 4 weeks	23.9	19.2	25.0	23.4	24.7	17.1	22.2
	Average of same 4 weeks last year	22.6	19.1	25.1	21.9	24.6	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

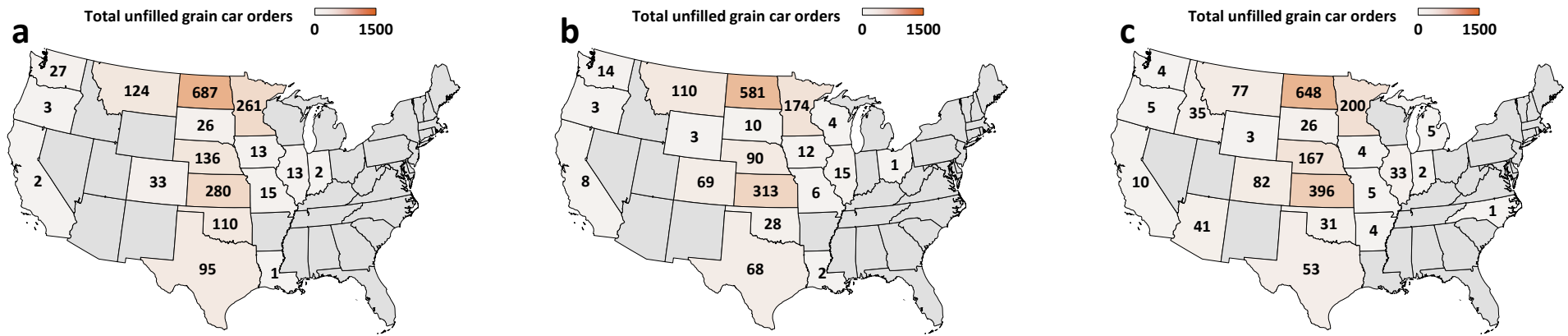
For the week ending: 12/5/2025		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	33	10	251	69	7	307	677
	Average over last 4 weeks	25	8	246	67	3	252	601
	Average of same 4 weeks last year	33	7	459	98	5	n/a	602
Average number of loaded grain cars not moved in over 48 hours	This week	11	108	512	54	7	732	1,423
	Average over last 4 weeks	12	114	329	66	3	748	1,273
	Average of same 4 weeks last year	52	222	414	84	3	n/a	775
Average number of grain unit trains held	This week	0	0	2	5	0	3	11
	Average over last 4 weeks	0	0	2	4	0	6	14
	Average of same 4 weeks last year	1	0	17	6	0	n/a	24
Total unfilled manifest grain car orders	This week	3	0	1,041	300	0	664	2,008
	Average over last 4 weeks	4	9	762	309	0	481	1,564
	Average of same 4 weeks last year	6	4	204	837	0	n/a	1,050

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](#).

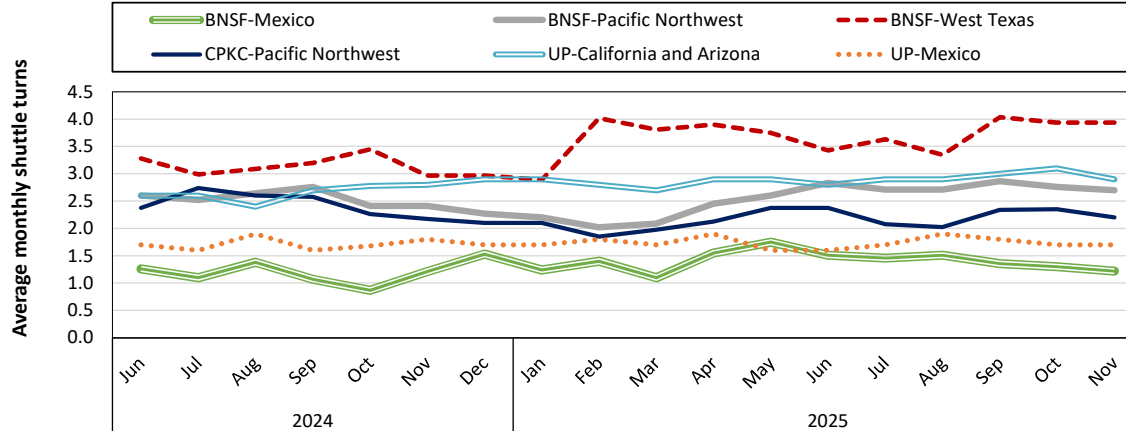
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 12/5/2025 (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

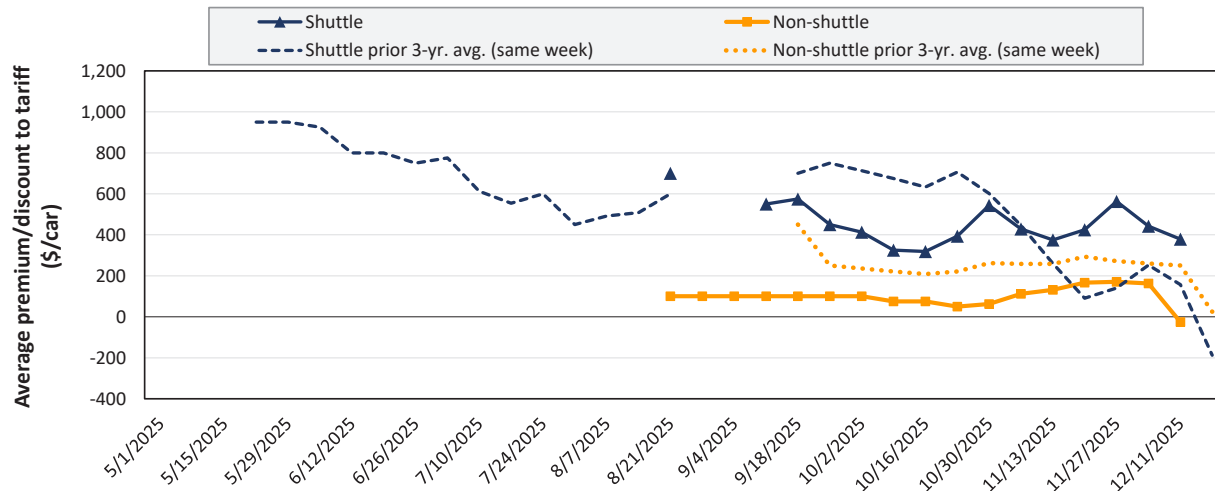


In November 2025, BNSF Railway's average monthly grain shuttle turns were 1.2 to Mexico, 2.7 to the Pacific Northwest, and 3.9 to West Texas. CPKC's shuttle turns averaged 2.2 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.7 to Mexico.

Note: A "shuttle turn" refers to the number of trips completed per month by a single train. Additional data (including additional regions and planned turns) are available on [AgTransport](https://www.agtransport.com/). BNSF = BNSF Railway; CPKC = Canadian Pacific Kansas City; UP = Union Pacific Railroad.
Source: Surface Transportation Board.

Railroads periodically auction guaranteed grain car service for an individual trip or a period of time (e.g., 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 December 2025



Average non-shuttle bids/offers fell \$188 this week, and are \$196 below the peak.

Average shuttle bids/offers fell \$63 this week and are \$321 below the peak.

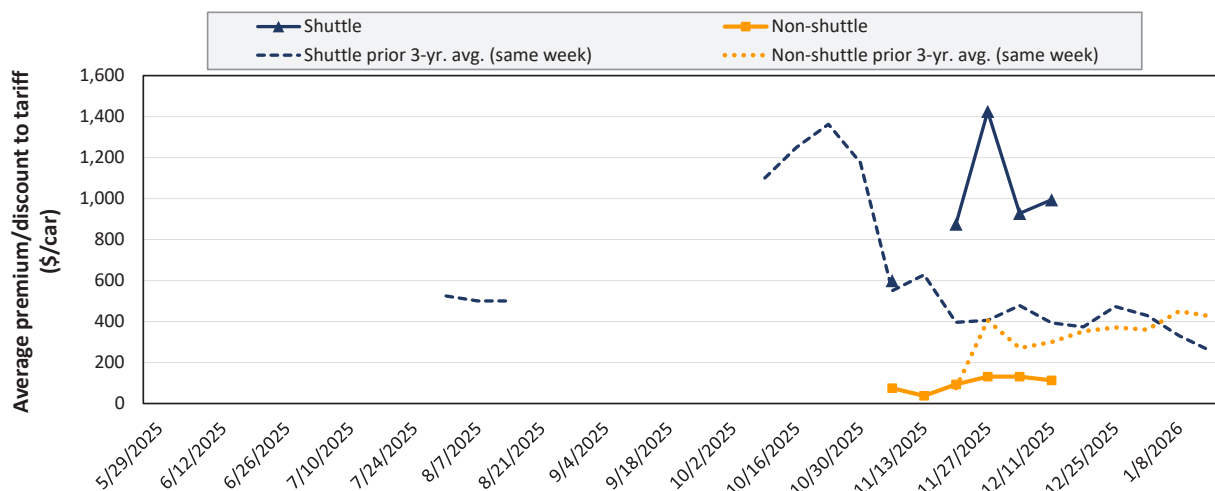
12/11/2025	BNSF	UP
Non-Shuttle	-\$25	n/a
Shuttle	\$600	\$158

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 January 2026



Average non-shuttle bids/offers fell \$19 this week, and are \$19 below the peak.

Average shuttle bids/offers rose \$66 this week and are \$431 below the peak.

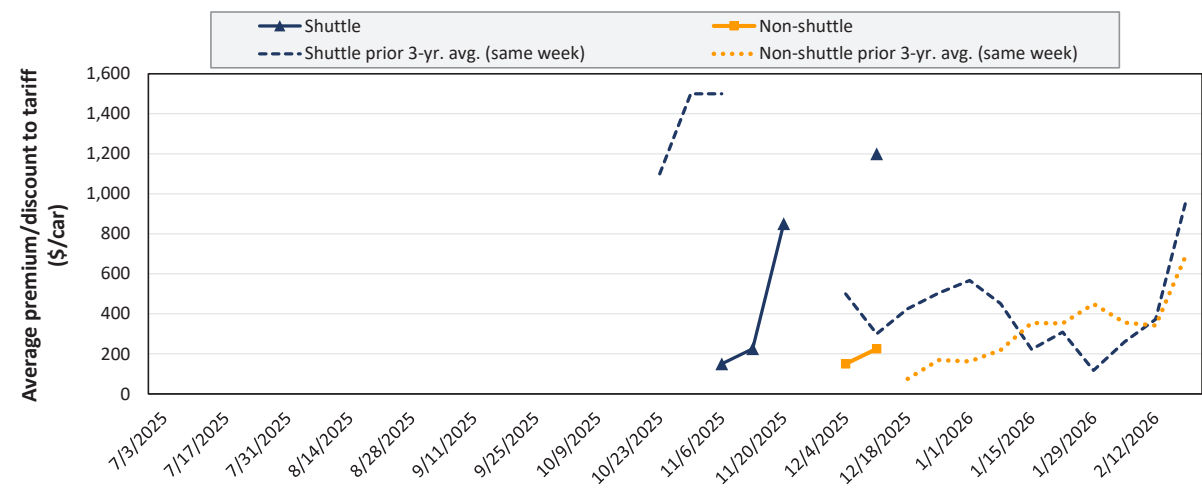
12/11/2025	BNSF	UP
Non-Shuttle	\$25	\$200
Shuttle	\$1,475	\$513

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 February 2026



Average non-shuttle bids/offers rose \$75 this week, and are at the peak.

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

12/11/2025	BNSF	UP
Non-Shuttle	n/a	\$225
Shuttle	\$1,200	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: 12/11/2025		Delivery period					
		Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26
Non-shuttle	BNSF	-25	25	n/a	n/a	n/a	n/a
	Change from last week	-25	-13	n/a	n/a	n/a	n/a
	Change from same week 2024	-50	-175	n/a	n/a	n/a	n/a
	UP	n/a	200	225	n/a	n/a	n/a
	Change from last week	n/a	-25	75	n/a	n/a	n/a
	Change from same week 2024	n/a	225	n/a	n/a	n/a	n/a
Shuttle	BNSF	600	1,475	1,200	1,250	600	n/a
	Change from last week	-125	-25	n/a	150	n/a	n/a
	Change from same week 2024	600	1,113	900	n/a	n/a	n/a
	UP	158	513	n/a	n/a	n/a	n/a
	Change from last week	-1	157	n/a	n/a	n/a	n/a
	Change from same week 2024	477	n/a	n/a	n/a	n/a	n/a
	CPKC	0	200	n/a	n/a	n/a	n/a
	Change from last week	-325	-200	n/a	n/a	n/a	n/a
	Change from same week 2024	0	0	n/a	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, December 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	\$106.83	\$5,938.83	\$1.61	\$58.98	3.5
	BNSF	Williston, ND	Superior, WI	Shuttle	\$4,291	\$54.99	\$4,345.99	\$1.17	\$43.16	4.8
	CPKC	Westby, MT	St. Louis, MO	Unit	\$5,788	\$520.07	\$6,308.07	\$1.70	\$62.64	4.8
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	\$4,804	\$63.99	\$4,867.99	\$1.32	\$48.34	4.3
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	\$6,215	\$135.09	\$6,350.09	\$1.72	\$63.06	3.3
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	\$2,865	\$26.46	\$2,891.46	\$0.78	\$28.71	7.4
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	\$5,732	\$137.61	\$5,869.61	\$1.59	\$58.29	5.4
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	\$5,838	\$114.03	\$5,952.03	\$1.61	\$59.11	3.5
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	\$5,412	\$93.42	\$5,505.42	\$1.49	\$54.67	3.8
	CPKC	Minot, ND	Kalama, WA	Unit	\$5,298	\$460.47	\$5,758.47	\$1.56	\$57.18	-2.0
	CPKC	Nekoma, ND	Chicago, IL	Manifest	\$5,030	\$276.74	\$5,306.74	\$1.43	\$52.70	4.9
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	\$3,400	\$57.42	\$3,457.42	\$0.93	\$34.33	-11.4
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	\$3,600	\$50.67	\$3,650.67	\$0.99	\$36.25	-14.1
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	\$5,800	\$171.00	\$5,971.00	\$1.61	\$59.29	-13.0
	BNSF	Garden City, KS	San Bernardino, CA	DET	\$5,700	\$123.84	\$5,823.84	\$1.57	\$57.83	-0.5
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,200	\$77.31	\$4,277.31	\$1.16	\$42.48	-12.0
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,000	\$68.13	\$4,068.13	\$1.10	\$40.40	-12.9
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	\$3,500	\$77.76	\$3,577.76	\$0.97	\$35.53	-14.2
	BNSF	Wichita, KS	Chicago, IL	DET	\$3,700	\$56.97	\$3,756.97	\$1.02	\$37.31	-12.1
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	\$3,900	\$57.42	\$3,957.42	\$1.07	\$39.30	-11.4
	UP	Byers, CO	Houston, TX	Shuttle	\$4,525	\$372.16	\$4,897.16	\$1.32	\$48.63	-7.1
	UP	Goodland, KS	Kansas City, MO	Manifest	\$4,967	\$139.20	\$5,106.20	\$1.38	\$50.71	2.0
	UP	Medford, OK	Houston, TX	Shuttle	\$3,775	\$183.68	\$3,958.68	\$1.07	\$39.31	-8.9
	UP	Salina, KS	Houston, TX	Shuttle	\$4,025	\$244.80	\$4,269.80	\$1.15	\$42.40	-8.3
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	\$4,791	\$69.48	\$4,860.48	\$1.31	\$48.27	4.3
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	\$4,439	\$68.22	\$4,507.22	\$1.22	\$44.76	4.6
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	\$2,032	\$29.97	\$2,061.97	\$0.56	\$20.48	0.0
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	\$8,611	\$0.00	\$8,611.00	\$2.33	\$85.51	3.2
	CSX	Chicago, IL	Albany, NY	Unit	\$7,676	\$0.00	\$7,676.00	\$2.07	\$76.23	3.5
	CSX	Chicago, IL	Buffalo, NY	Manifest	\$6,102	\$0.00	\$6,102.00	\$1.65	\$60.60	3.0
	CSX	Chicago, IL	Indiantown, FL	Manifest	\$8,832	\$0.00	\$8,832.00	\$2.39	\$87.71	3.1

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. 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, December 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	\$5,600	\$95.94	\$5,695.94	\$1.44	\$56.56	-3.4
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	\$5,470	\$151.56	\$5,621.56	\$1.42	\$55.82	0.0
	BNSF	Edison, NE	Hanford, CA	Railroad	\$5,460	\$159.84	\$5,619.84	\$1.42	\$55.81	-8.8
	BNSF	Edison, NE	Hereford, TX	Railroad	\$4,500	\$65.52	\$4,565.52	\$1.15	\$45.34	-10.6
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	\$5,350	\$158.31	\$5,508.31	\$1.39	\$54.70	0.0
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	\$4,620	\$84.15	\$4,704.15	\$1.19	\$46.71	1.3
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	\$4,260	\$68.76	\$4,328.76	\$1.09	\$42.99	-11.1
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	\$4,000	\$84.33	\$4,084.33	\$1.03	\$40.56	-11.7
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	\$5,430	\$127.71	\$5,557.71	\$1.40	\$55.19	0.0
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	\$5,430	\$149.94	\$5,579.94	\$1.41	\$55.41	0.0
	CN	Gibson City, IL	Reserve, LA	Private	\$2,301	\$316.25	\$2,617.25	\$0.66	\$25.99	5.3
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,681	\$316.25	\$2,997.25	\$0.76	\$29.76	4.6
	CPKC	Delhi, LA	Morton, MS	Railroad	\$1,342	\$46.80	\$1,388.80	\$0.35	\$13.79	0.2
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,047	\$529.57	\$5,576.57	\$1.41	\$55.38	1.7
	CPKC	Glenwood, MN	Boardman, OR	Railroad	\$5,513	\$509.59	\$6,022.59	\$1.52	\$59.81	1.5
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	\$6,241	\$0.00	\$6,241.00	\$1.57	\$61.98	4.7
	CSX	Marysville, OH	Rose Hill, NC	Railroad	\$6,378	\$0.00	\$6,378.00	\$1.61	\$63.34	3.9
	CSX	Olney, IL	Fairmount, GA	Railroad	\$4,891	\$0.00	\$4,891.00	\$1.23	\$48.57	3.9
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	\$3,935	\$221.12	\$4,156.12	\$1.05	\$41.27	-3.2
	UP	Frankfort, KS	Calipatria, CA	Railroad	\$5,855	\$503.04	\$6,358.04	\$1.60	\$63.14	-1.8
Soybeans	UP	Mead, NE	Keyes, CA	Railroad	\$6,015	\$555.84	\$6,570.84	\$1.66	\$65.25	-1.7
	UP	Nebraska City, NE	Amarillo, TX	Railroad	\$4,855	\$228.48	\$5,083.48	\$1.28	\$50.48	-2.6
	UP	Sloan, IA	Burley, ID	Railroad	\$5,535	\$376.32	\$5,911.32	\$1.49	\$58.70	-2.1
	UP	Sterling, IL	Nashville, AR	Railroad	\$4,075	\$231.36	\$4,306.36	\$1.09	\$42.76	-3.1
	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	\$6,135	\$137.52	\$6,272.52	\$1.70	\$62.29	0.0
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	\$5,185	\$147.06	\$5,332.06	\$1.44	\$52.95	-22.0
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	\$6,085	\$132.21	\$6,217.21	\$1.68	\$61.74	0.0
	BNSF	Casselton, ND	St. Louis, MO	Railroad	\$3,400	\$76.95	\$3,476.95	\$0.94	\$34.53	-23.8
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	\$6,185	\$146.16	\$6,331.16	\$1.71	\$62.87	0.0
	CN	Gibson City, IL	Reserve, LA	Private	\$2,301	\$316.25	\$2,617.25	\$0.71	\$25.99	5.6
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,681	\$316.25	\$2,997.25	\$0.81	\$29.76	4.9
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,785	\$529.57	\$6,314.57	\$1.71	\$62.71	1.5
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	\$3,526	\$404.76	\$3,930.76	\$1.06	\$39.03	1.8
	CSX	Casey, IL	Mobile, AL	Private	\$3,646	\$0.00	\$3,646.00	\$0.99	\$36.21	0.0
	CSX	Marion, OH	Chesapeake, VA	Private	\$3,214	\$0.00	\$3,214.00	\$0.87	\$31.92	0.0
	UP	Canton, KS	Houston, TX	Railroad	\$3,650	\$239.04	\$3,889.04	\$1.05	\$38.62	-27.6
	UP	Cozad, NE	Kalama, WA	Railroad	\$5,140	\$499.84	\$5,639.84	\$1.52	\$56.01	-14.7
	UP	Cozad, NE	Houston, TX	Railroad	\$4,010	\$344.96	\$4,354.96	\$1.18	\$43.25	-25.3
	UP	Sloan, IA	Ama, LA	Railroad	\$4,090	\$393.92	\$4,483.92	\$1.21	\$44.53	-24.8

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, December 2025

Commodity	US origin	US border city	US railroad	Train type	US Tariff Rate per car (USD)	US Fuel Surcharge per car (USD)	US Rate Plus Fuel Surcharge per car (USD)	US Tariff Rate + Fuel Surcharge per bushel (USD)	US Tariff Rate + Fuel Surcharge per metric ton (USD)	Percent Y/Y
Corn	Adair, IL	El Paso, TX	BNSF	Shuttle	\$4,641	\$115	\$4,756	\$1.19	\$46.81	1.7%
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	\$5,080	\$501	\$5,581	\$1.40	\$54.93	0.5%
	Council Bluffs, IA	Laredo, TX	CPKC	Non-shuttle	\$5,550	\$555	\$6,105	\$1.53	\$60.09	0.5%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,005	\$479	\$5,484	\$1.37	\$53.97	0.5%
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	\$5,190	\$508	\$5,698	\$1.42	\$56.08	0.5%
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	\$4,535	\$409	\$4,944	\$1.24	\$48.66	-2.4%
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	\$4,655	\$424	\$5,079	\$1.27	\$49.99	-2.4%
Soybeans	Superior, NE	El Paso, TX	BNSF	Shuttle	\$4,622	\$91	\$4,713	\$1.18	\$46.39	-7.4%
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	\$5,080	\$501	\$5,581	\$1.49	\$54.93	0.5%
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	\$4,325	\$98	\$4,423	\$1.18	\$43.53	-18.4%
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	\$4,950	\$389	\$5,339	\$1.43	\$52.55	-19.3%
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	\$4,325	\$98	\$4,423	\$1.18	\$43.53	-18.4%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,005	\$479	\$5,484	\$1.47	\$53.97	0.5%
Wheat	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	\$5,035	\$407	\$5,442	\$1.46	\$53.56	-19.0%
	FT Worth, TX	El Paso, TX	BNSF	DET	\$3,000	\$71	\$3,071	\$0.82	\$30.22	-25.2%
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	\$2,800	\$71	\$2,871	\$0.77	\$28.26	-21.8%
	Great Bend, KS	Laredo, TX	UP	Shuttle	\$4,099	\$292	\$4,391	\$1.18	\$43.22	-8.5%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	\$5,005	\$479	\$5,484	\$1.47	\$53.97	0.5%
	Wichita, KS	Laredo, TX	UP	Shuttle	\$4,024	\$257	\$4,281	\$1.15	\$42.13	-6.7%

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).

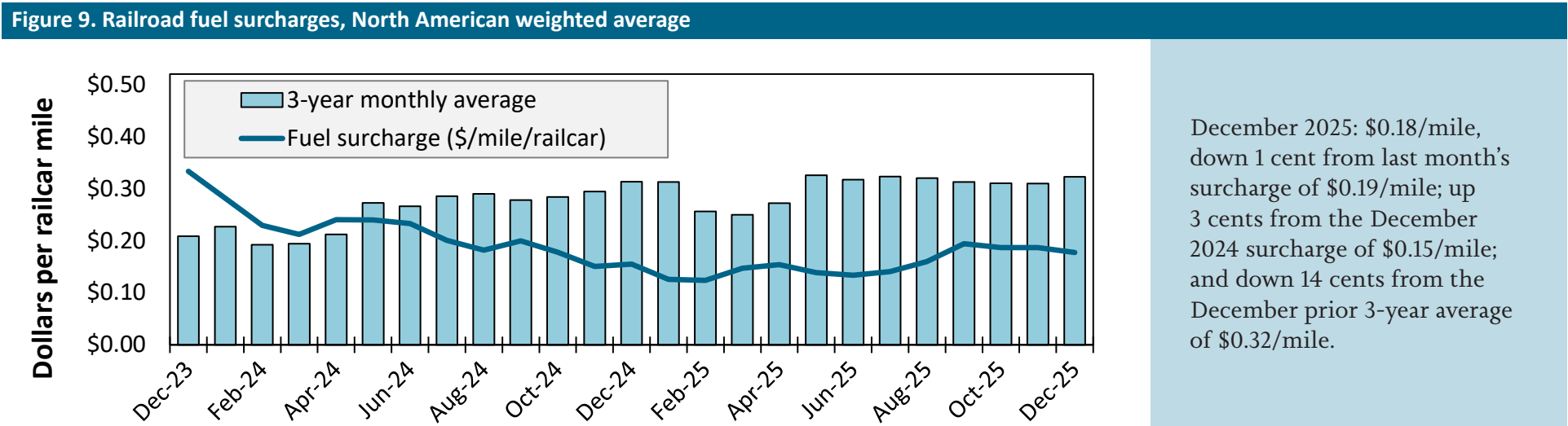
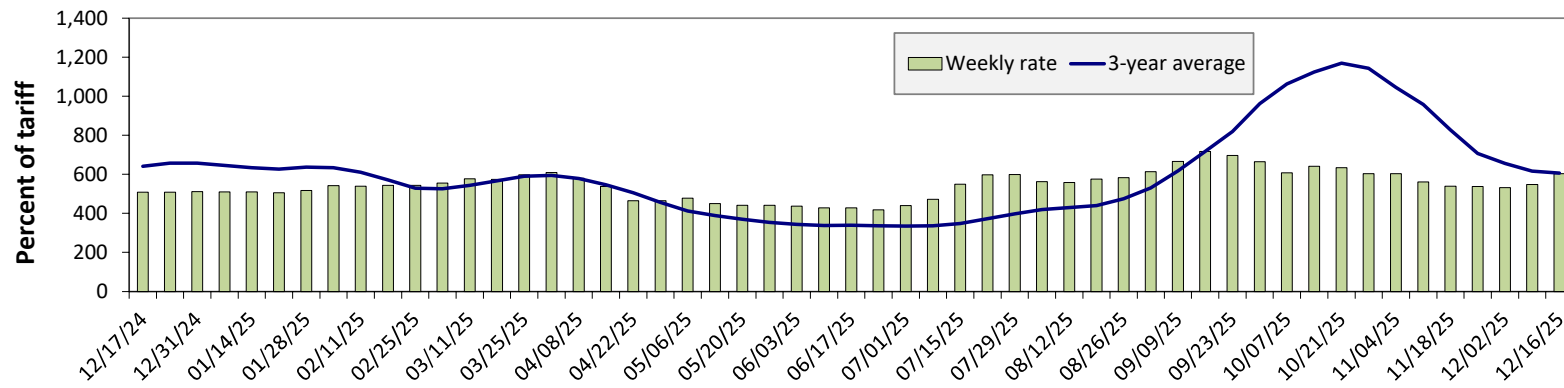


Figure 10. Illinois River barge freight rate



For the week ending December 16: 10 percent higher than the previous week; 19 percent higher than last year; and 1 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	12/16/2025	n/a	595	603	503	504	389
	12/9/2025	n/a	539	547	454	483	378
\$/ton	12/16/2025	n/a	31.65	27.98	20.07	23.64	12.21
	12/9/2025	n/a	28.67	25.38	18.11	22.65	11.87
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	n/a	15	19	29	22	26
	3-year avg.	n/a	2	-1	-4	-7	-12
Rate	January	n/a	n/a	557	457	466	383
	March	n/a	542	510	418	420	351

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](#).

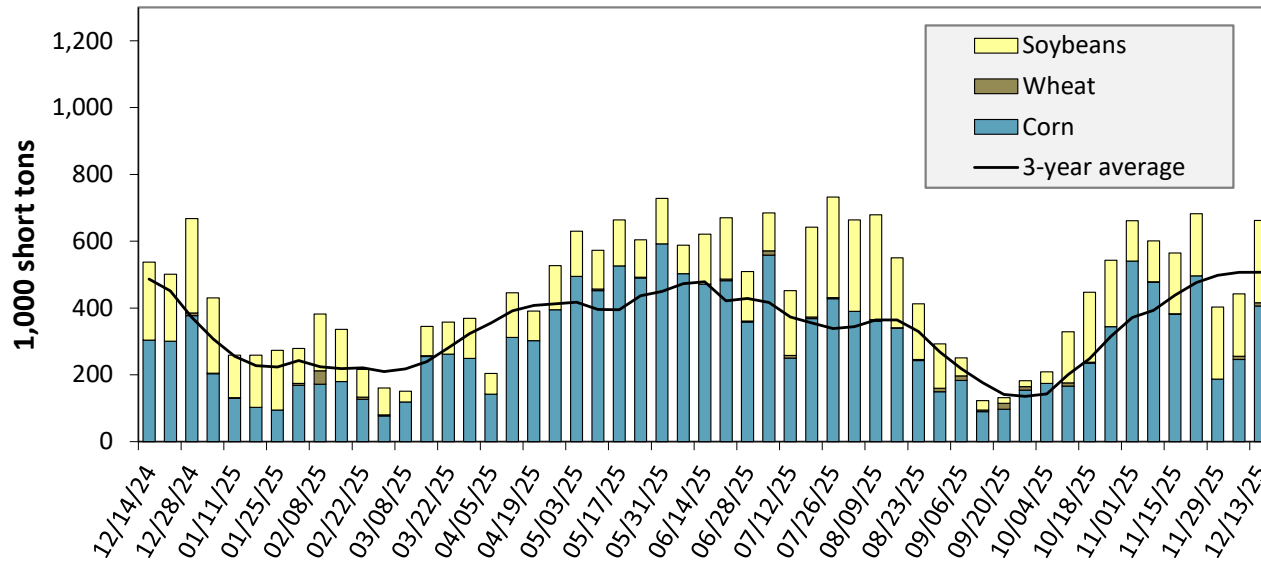
Source: USDA, Agricultural Marketing Service.

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 December 13:
23 percent higher than last year and
31 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.

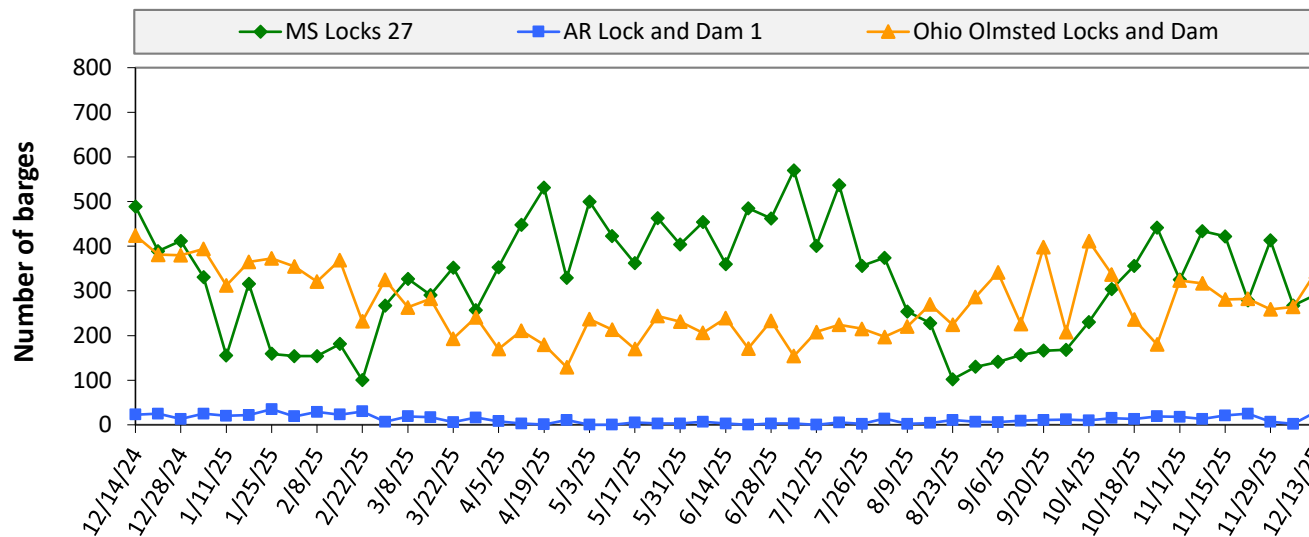
Table 10. Barged grain movements (1,000 tons)

For the week ending 12/13/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	25	0	17	0	42
Mississippi River (Winfield, MO (L25))	258	10	199	0	466
Mississippi River (Alton, IL (L26))	410	10	263	0	682
Mississippi River (Granite City, IL (L27))	406	10	246	0	662
Illinois River (La Grange)	128	0	54	0	182
Ohio River (Olmsted)	93	12	75	4	184
Arkansas River (L1)	0	10	32	0	42
Weekly total - 2025	499	32	353	4	888
Weekly total - 2024	472	16	415	0	902
2025 YTD	19,011	1,234	10,684	166	31,095
2024 YTD	14,330	1,507	11,857	192	27,886
2025 as % of 2024 YTD	133	82	90	86	112
Last 4 weeks as % of 2024	108	150	69	259	88
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.

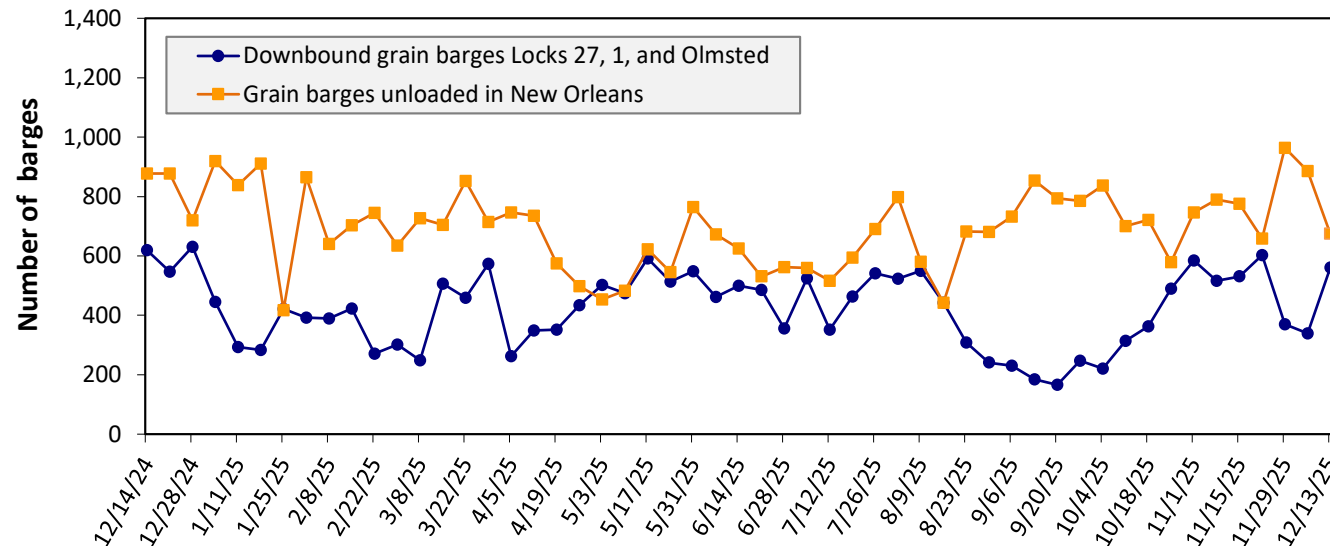
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending December 13: 664 barges transited the locks, 131 barges more than the previous week, and 4 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 December 13: 561 barges moved down river, 222 more than the previous week; 674 grain barges unloaded in the New Orleans Region, 24 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	
		December 2025	November 2025	December 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$22.79	\$23.01	\$21.58	5.6	4.4
	Central Ferry, WA/Almota, WA	\$21.86	\$22.08	\$20.68	5.7	4.2
	Lyons Ferry, WA	\$20.81	\$21.03	\$19.67	5.8	4.0
	Windust, WA/Lower Monumental, WA	\$19.74	\$19.96	\$18.64	5.9	3.8
	Sheffler, WA	\$19.71	\$19.93	\$18.61	5.9	3.8
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$18.47	\$18.69	\$17.41	6.1	3.5
	Port Kelly, WA/Wallula, WA	\$18.24	\$18.46	\$17.19	6.1	3.4
	Umatilla, OR	\$18.14	\$18.36	\$17.09	6.1	3.4
	Boardman, OR/Hogue Warner, OR	\$17.87	\$18.09	\$16.83	6.2	3.3
	Arlington, OR/Roosevelt, WA	\$17.71	\$17.93	\$16.67	6.2	3.3
	Biggs, OR	\$16.33	\$16.55	\$15.34	6.4	2.9
	The Dalles, OR	\$15.19	\$15.41	\$14.24	6.7	2.5

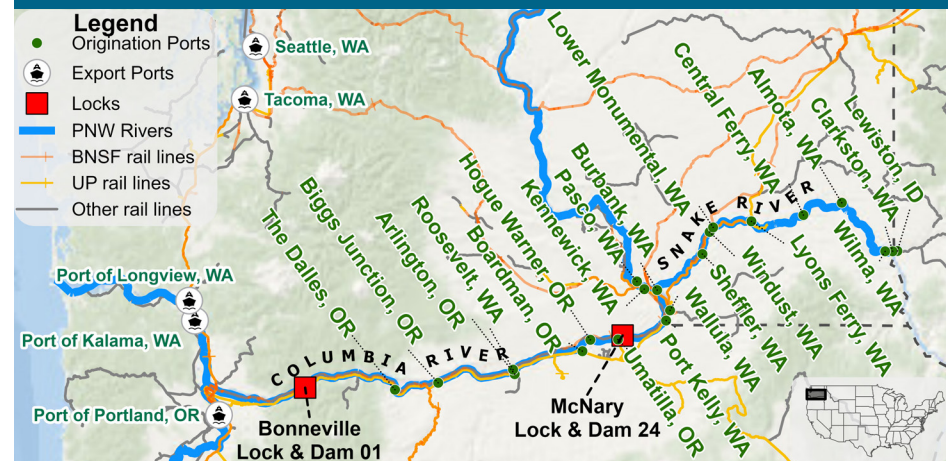
Note: Destination is Portland, OR, or Vancouver, WA; ton = 2,000 pounds; n/a = data not available.
Source: USDA, Agricultural Marketing Service.

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

November, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	363	0	363
Columbia River (Bonneville Lock and Dam (L1))	450	0	450
Monthly total 2025	450	0	450
Monthly total 2024	338	0	338
2025 YTD	3,869	0	3,869
2024 YTD	3,258	0	3,258

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.

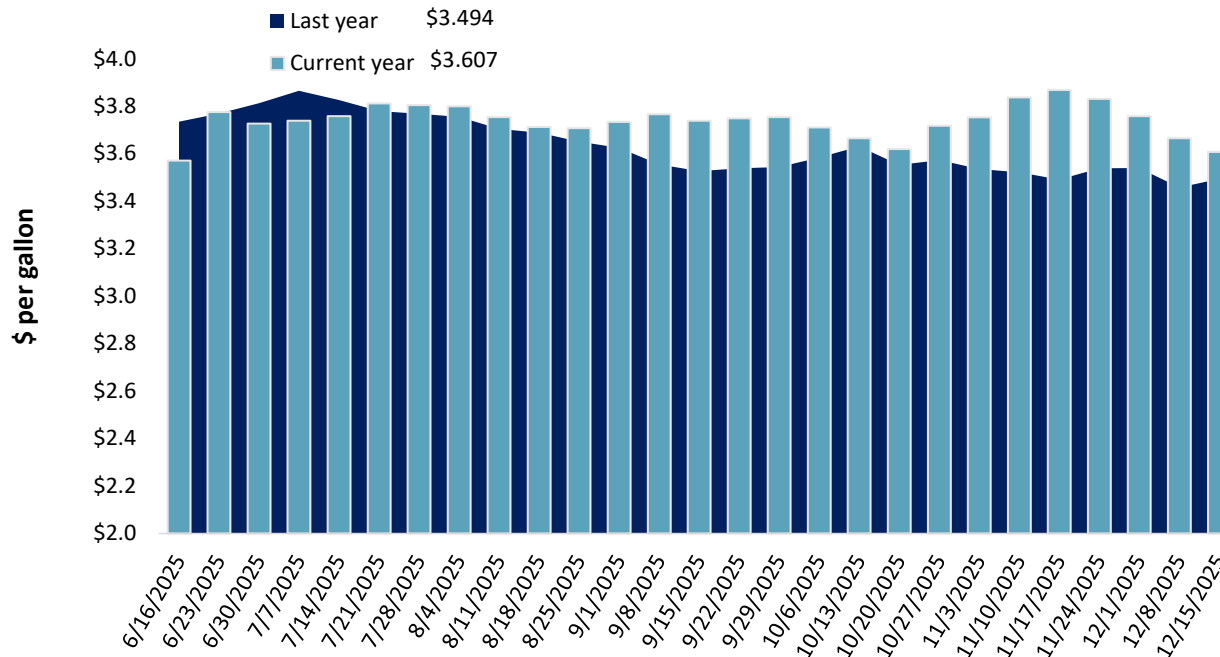
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 12/15/2025 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.703	-0.026	0.128
	New England	4.064	0.024	0.310
	Central Atlantic	3.944	-0.004	0.183
	Lower Atlantic	3.580	-0.037	0.093
II	Midwest	3.567	-0.068	0.117
III	Gulf Coast	3.267	-0.060	0.077
IV	Rocky Mountain	3.385	-0.113	0.028
V	West Coast	4.294	-0.076	0.164
	West Coast less California	3.871	-0.073	0.145
	California	4.781	-0.081	0.184
Total	United States	3.607	-0.058	0.113

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 December 15, the U.S. average diesel fuel price decreased 5.8 cents from the previous week to \$3.607 per gallon, 11.3 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 11/27/2025	1,727	854	1,450	1,839	152	6,022	24,696	10,214	40,932
	This week year ago	1,041	817	1,522	1,329	110	4,818	22,808	14,483	42,108
	Last 4 wks. as % of same period 2024/25	167	104	91	130	130	121	108	65	95
Current shipped (cumulative) exports sales	2025/26 YTD	5,143	1,812	3,273	2,460	230	12,918	19,659	11,615	44,193
	2024/25YTD	2,508	1,662	3,466	2,779	172	10,586	11,384	21,488	43,457
	YTD 2025/26 as % of 2024/25	205	109	94	89	134	122	173	54	102
	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 11/27/2025	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	15,253	13,702	11	19,839
Japan	6,369	4,275	49	10,478
Colombia	3,233	2,661	22	5,493
China	0	26	-100	3,461
Korea	3,769	879	329	3,127
Top 5 importers	24,855	20,664	20	39,272
Total U.S. corn export sales	44,356	34,191	30	54,276
% of YTD current month's export projection	55%	47%	-	-
Change from prior week	1,792	1,732	-	-
Top 5 importers' share of U.S. corn export sales	56%	60%	-	72%
USDA forecast December 2025	81,284	72,597	12	-
Corn use for ethanol USDA forecast, December 2025	142,240	138,075	3	-

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2024/25 (September 1 – August 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments' change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales. In rightmost column, "Exports" = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.

Source: USDA, Foreign Agricultural Service.

Table 16. Top 5 importers of U.S. soybeans

For the week ending 11/27/2025	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	3,015	16,483	-82	26,078
Mexico	3,367	2,898	16	4,762
Japan	1,015	941	8	2,107
Egypt	2,006	1,437	40	2,098
Indonesia	819	695	18	1,997
Top 5 importers	10,221	22,453	-54	37,042
Total U.S. soybean export sales	21,829	35,971	-39	48,941
% of YTD current month's export projection	49%	70%	-	-
Change from prior week	1,106	2,313	-	-
Top 5 importers' share of U.S. soybean export sales	47%	62%	-	76%
USDA forecast, December 2025	44,497	51,220	-13	-

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 11/27/2025	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	3,040	2,914	4	3,358
Philippines	2,106	1,934	9	2,473
Japan	1,404	1,428	-2	2,045
China	385	139	177	1,137
Korea	1,423	1,654	-14	1,674
Taiwan	686	728	-6	935
Thailand	516	610	-15	667
Nigeria	1,151	314	266	629
Indonesia	931	610	53	518
Colombia	538	317	70	489
Top 10 importers	12,179	10,648	14	13,926
Total U.S. wheat export sales	18,940	15,404	23	19,135
% of YTD current month's export projection	77%	69%	-	-
Change from prior week	461	378	-	-
Top 10 importers' share of U.S. wheat export sales	64%	69%	-	73%
USDA forecast, December 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)

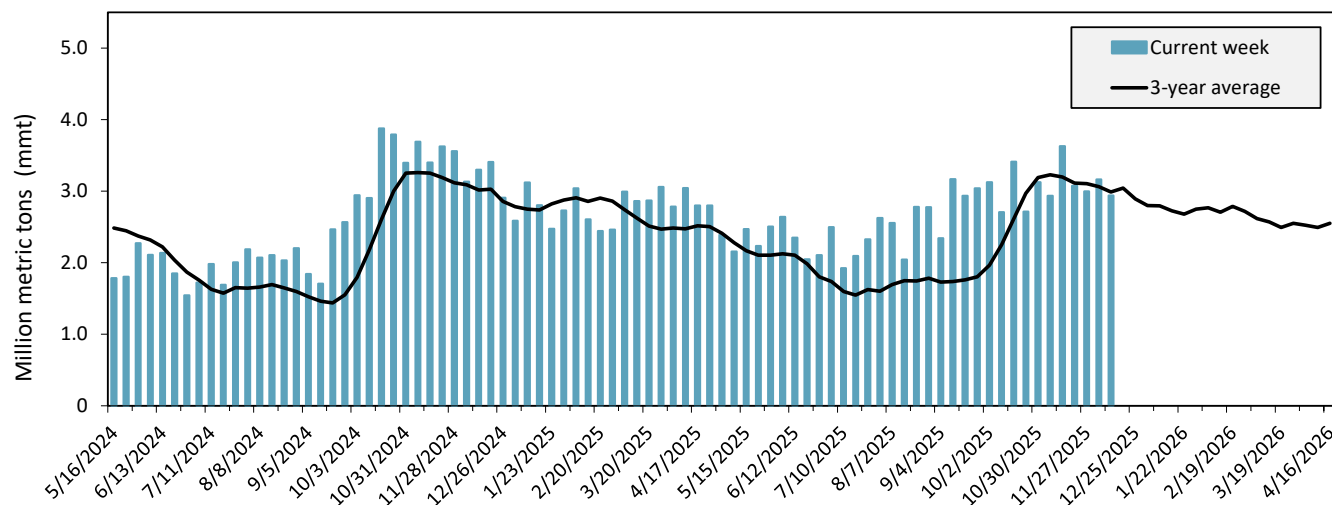
Port regions	Commodity	For the week ending 12/11/2025	Previous week*	Current week as % of previous	2025 YTD*	2024 YTD*	2025 YTD as % of 2024 YTD	Last 4-weeks as % of:		2024 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	495	680	73	22,593	13,236	171	255	390	13,987
	Soybeans	0	67	0	2,697	9,487	28	10	9	10,445
	Wheat	289	264	110	11,602	10,834	107	149	153	11,453
	All grain	784	1,010	78	37,095	34,847	106	104	110	37,186
Mississippi Gulf	Corn	740	630	117	35,366	25,767	137	119	164	27,407
	Soybeans	520	552	94	21,545	26,987	80	47	57	29,741
	Wheat	59	34	174	3,844	4,409	87	151	200	4,523
	All grain	1,319	1,216	108	60,795	57,281	106	72	90	61,789
Texas Gulf	Corn	23	0	n/a	590	553	107	204	154	570
	Soybeans	58	102	57	1,374	599	229	210	351	741
	Wheat	64	29	220	4,562	1,756	260	141	168	1,940
	All grain	215	131	164	7,416	6,571	113	115	110	6,965
Interior	Corn	297	374	79	14,641	12,881	114	147	150	13,463
	Soybeans	154	189	82	7,230	7,559	96	72	90	8,059
	Wheat	76	69	110	2,966	2,827	105	108	120	2,989
	All grain	529	633	84	25,327	23,529	108	109	124	24,791
Great Lakes	Corn	23	38	60	354	193	183	236	489	271
	Soybeans	0	0	n/a	63	117	54	6	1	136
	Wheat	0	0	n/a	334	573	58	94	77	653
	All grain	23	39	59	751	882	85	147	102	1,060
Atlantic	Corn	6	19	30	581	396	147	407	572	410
	Soybeans	63	63	100	962	1,049	92	89	70	1,272
	Wheat	0	0	n/a	81	72	113	n/a	n/a	73
	All grain	69	82	84	1,624	1,517	107	116	95	1,754
All Regions	Corn	1,583	1,741	91	74,125	53,027	140	159	208	56,109
	Soybeans	796	1,025	78	34,122	46,217	74	46	51	50,865
	Wheat	488	396	123	23,389	20,470	114	139	151	21,631
	All grain	2,939	3,163	93	133,261	125,048	107	89	102	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. grain export 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)

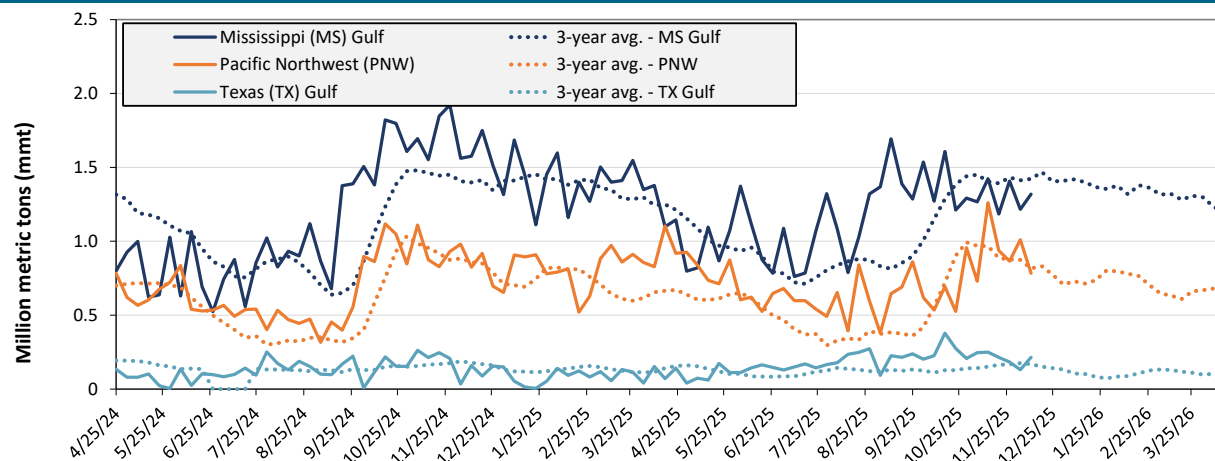


For the week ending December 11: 2.9 mmt of grain inspected, down 7 percent from the previous week, down 4 percent from the same week last year, and down 2 percent from the 3-year average.

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 12/11/25 inspections (mmt):

MS Gulf: 1.32

PNW: 0.78

TX Gulf: 0.21

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 8	up 64	up 14	down 22
Last year (same 7 days)	down 14	up 35	down 9	up 14
3-year average (4-week moving average)	down 7	up 27	down 4	down 4

Source: USDA, Federal Grain Inspection Service.

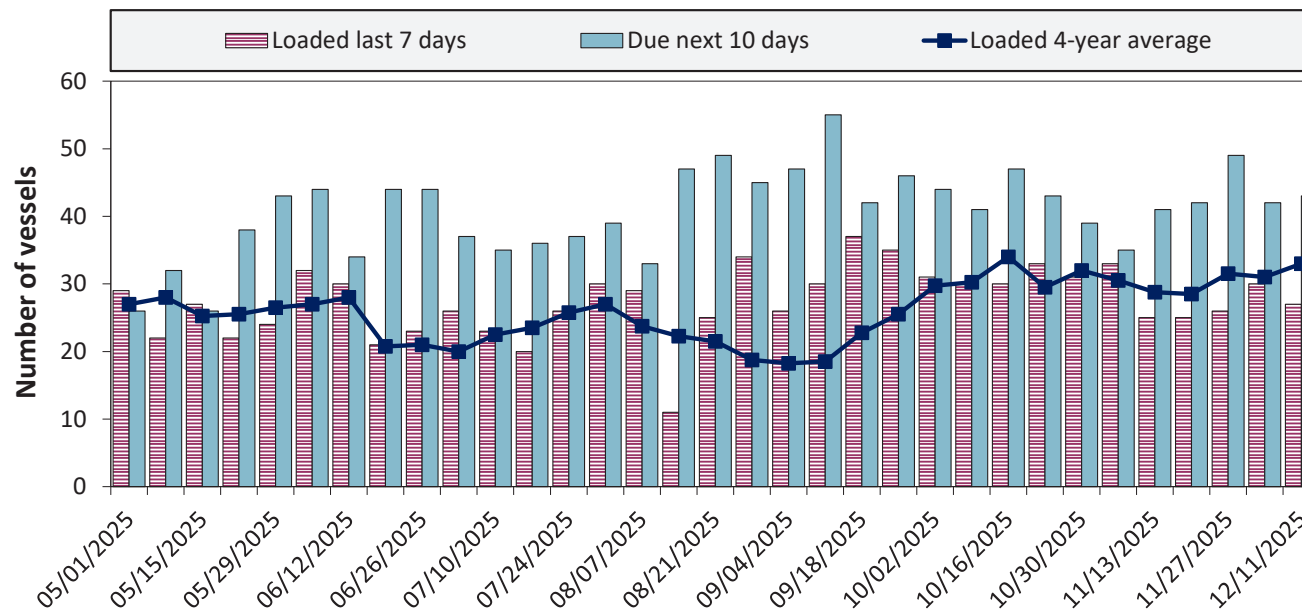
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
12/11/2025	26	27	43	15
12/4/2025	24	30	42	10
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

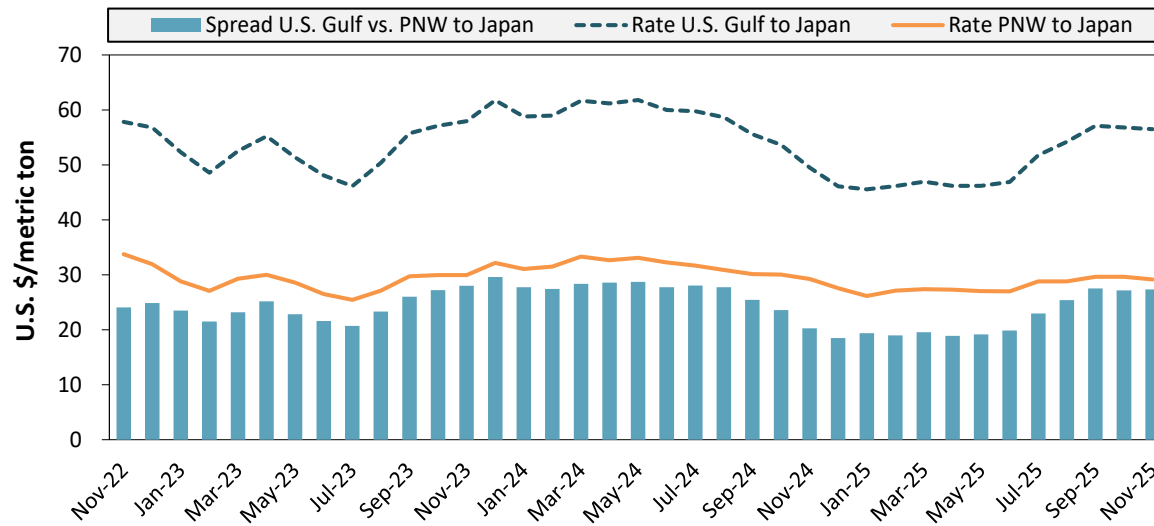


Week ending 12/11/25, number of vessels	Loaded	Due
Change from last year	-23%	-17%
Change from 4-year average	-18%	-19%

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
November 2025	\$56.50	\$29.15	\$27.35
Change from November 2024	14%	-0%	35%
Change from 4-year average	-7%	-13%	1%

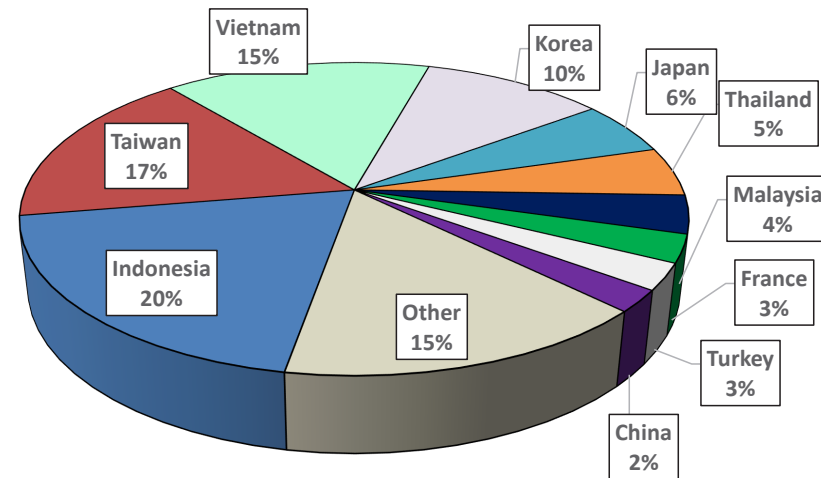
Table 20. Ocean freight rates for selected shipments, week ending 12/13/2025

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	Nov 27, 2025	Dec 22/31, 2025	66,000	56.00
U.S. Gulf	S. Korea	Soybeans	Dec 4, 2025	Dec 20/30, 2025	58,000	65.50
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	Indonesia	Soybeans	Sep 17, 2025	Oct 15/Nov 5, 2025	68,000	50.50
U.S. Gulf	Bangladesh	Soybeans	Sep 23, 2025	Oct 1/10, 2025	55,000	65.75
PNW	China	Heavy grain	Nov 28, 2025	Jan 1/31, 2025	65,000	29.25
PNW	China	Soybeans	Nov 28, 2025	Dec 25/31, 2025	68,000	32.75
PNW	Taiwan	Wheat	Nov 13, 2025	Jan 26/Feb 5, 2025	52,000	40.25
PNW	Taiwan	Wheat	Sep 03, 2025	Nov 1/10, 2025	46,000	49.00
PNW	S. Korea	Corn	Nov 20, 2025	Jan 1/10, 2026	65,000	33.28
PNW	Taiwan	Wheat	Aug 28, 2025	Oct 1/10, 2025	46,000	48.00
Brazil	N. China	Heavy grain	Oct 9, 2025	Nov 1/7, 2025	66,000	40.00
Brazil	N. China	Heavy grain	Oct 7, 2025	Oct 20/30, 2025	66,000	37.50
Brazil	S. Korea	Soybeans	Nov 25, 2025	Dec 1/10, 2025	60,000	47.25

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

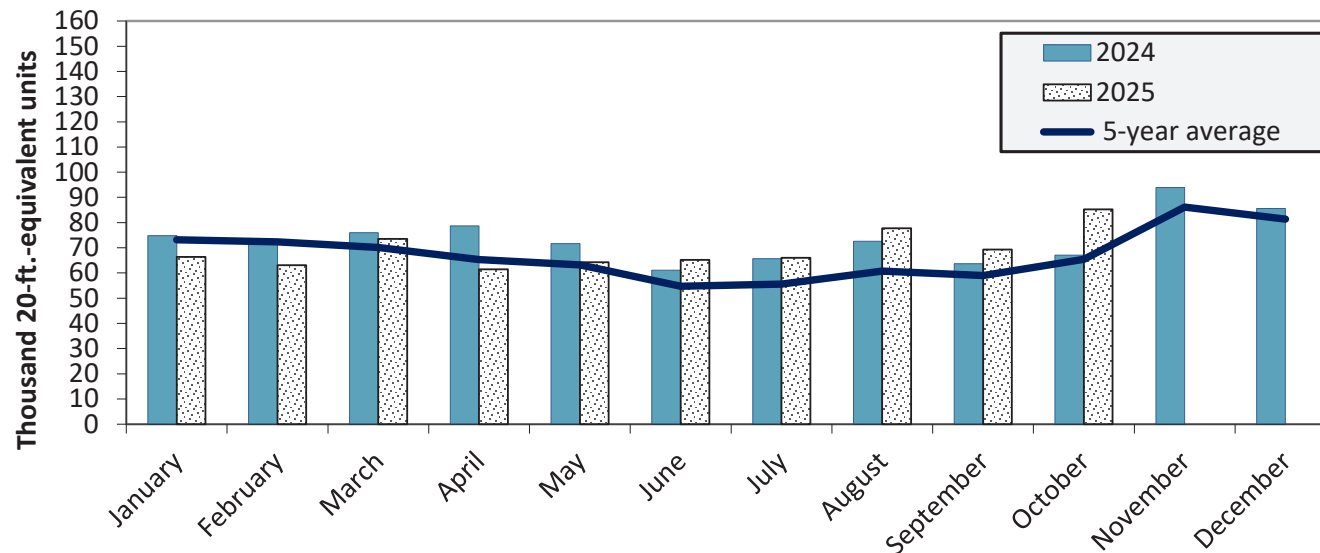
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Oct 2025



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 October 2025 were up 27.0 percent from last year and up 30.3 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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