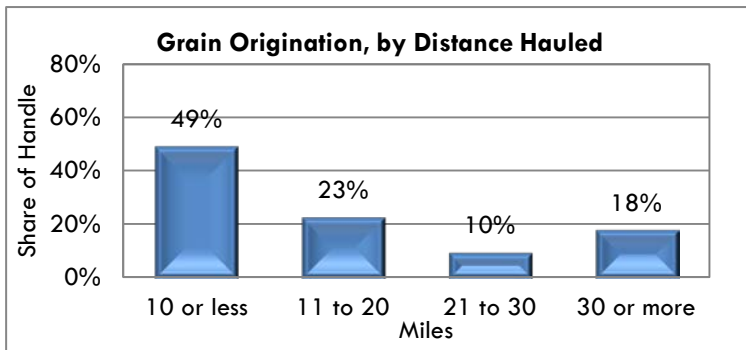
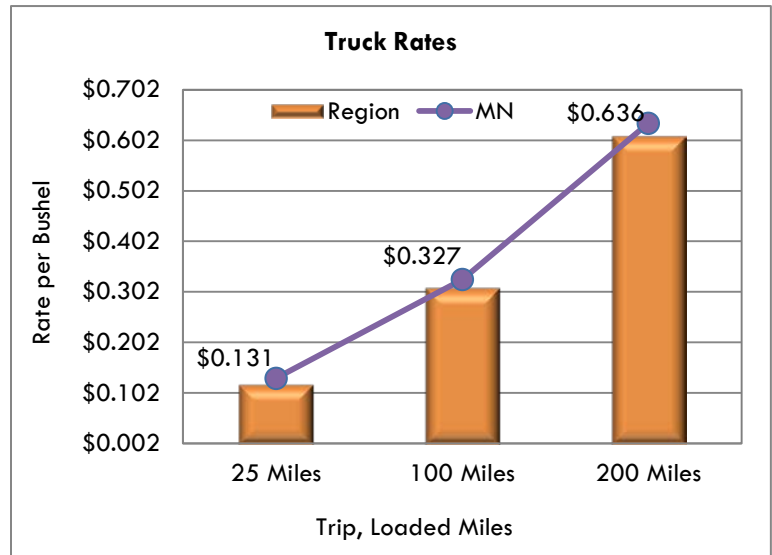
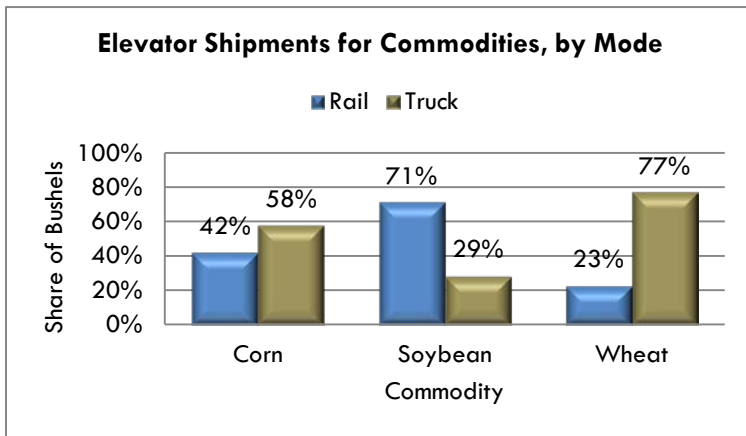
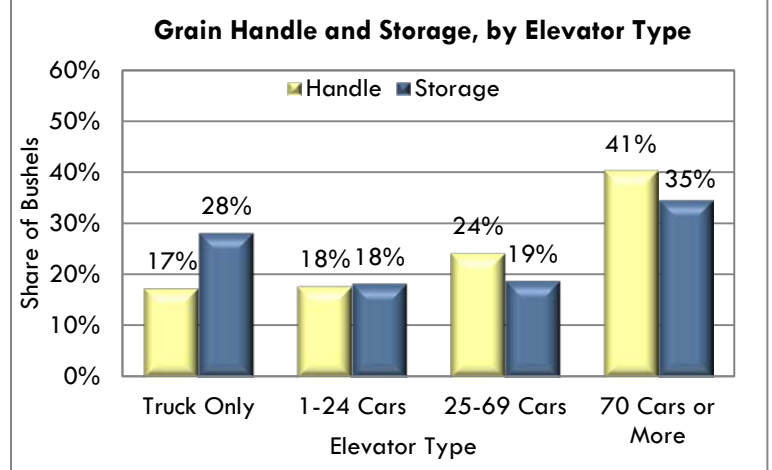
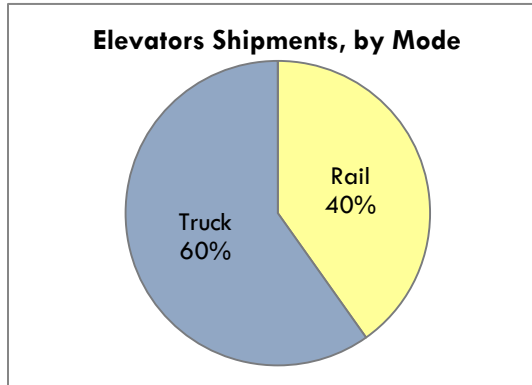


Minnesota Elevator Transportation Activities and Service, 2012 Survey

March 2012

SURVEY RESPONSES

Response Rate: 24%=55 responses of 225 mailed • Respondent Shipments=30% of 2011 Production



Market Flows of Corn, Soybeans, and Wheat, by Mode and Destination

Crop	Mode	In-State End User	Domestic East	Domestic West	Export Gulf	Export Pacific	Export Mexico	Export Canada	Domestic Other	Export Other
Corn	Rail	2.3%	2.4%	3.6%	0.9%	29.0%	0.2%	0.1%	0.0%	0.0%
	Truck	55.3%	0.0%	1.2%	0.7%	0.3%	0.0%	0.4%	0.6%	3.1%
Soybean	Rail	0.2%	1.9%	0.0%	0.8%	50.1%	0.0%	0.0%	0.0%	0.0%
	Truck	43.5%	0.1%	1.9%	0.7%	0.0%	0.0%	0.0%	0.0%	0.7%
Wheat	Rail	24.1%	31.1%	8.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Truck	31.9%	4.4%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%

In Cooperation with the Minnesota Grain and Feed Association

...Upper Great Plains Transportation Institute, NDSU, is solely responsible for the content of the report, 701.231.7767, info@ugpti.org.

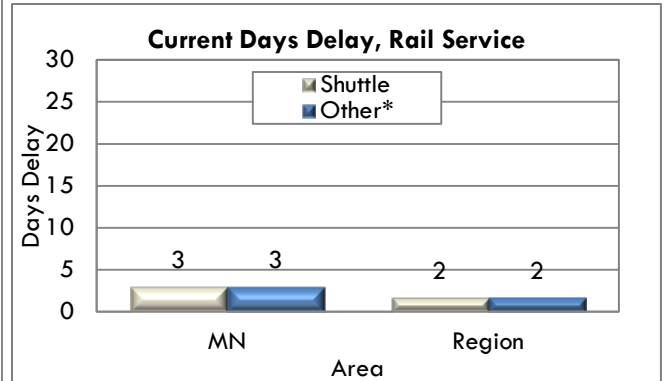
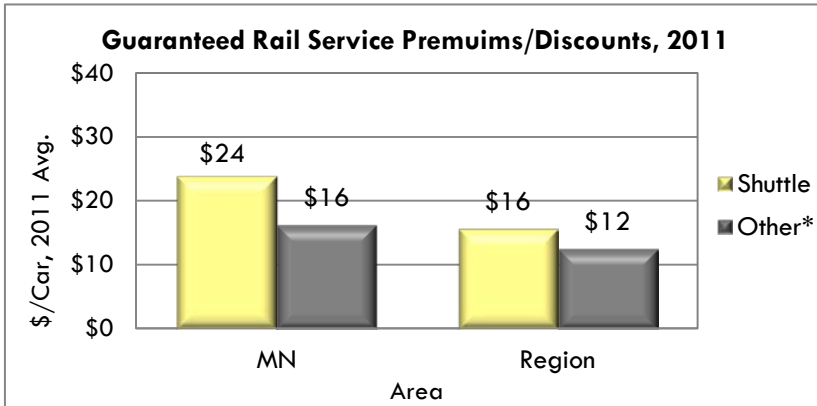
Funding provided by Federal Highway Administration, U.S. DOT.

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Importance of Transportation Issues in the Future U.S. Grain Industry Growth, based on Response Rating

Rank	Issue	Rating	Rank	Issue (cont.)	Rating
1	Export Market Demands	4.3	7	Domestic Farm Policy	3.8
2	Local Road Investments	4.2	8	Port Capacity	3.7
3	Trade Agreements/International Policy	4.0	9	Bio-Energy Industry Expansion Demands	3.7
4	Local Processing/Feeding Demands	4.0	10	Food Security/Safety	3.6
5	Rail Industry Capacity	3.9	11	Inland Waterway Capacity	3.6
6	Truck Industry Capacity	3.8	12	International Competitor Investments	3.5

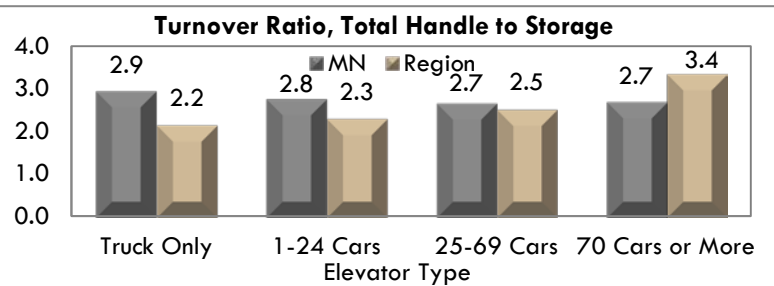
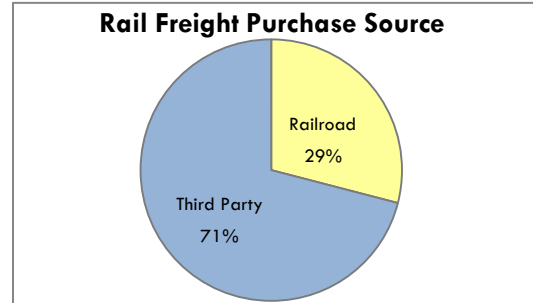
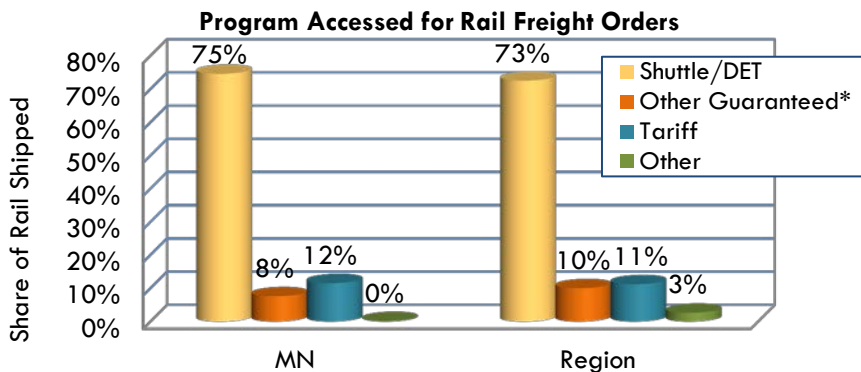
Rating 1=Not Important to 5=Very Important



Range for Rail Premiums
 2011 Shuttle: \$-230...\$250
 2011 Other Guaranteed: \$0...\$200

Range for Days Delay
 Current Shuttle: 0...12 days
 Current Other Guaranteed: 0...7 days

*Other Guaranteed Rail Freight includes COTs, GCAS, DET, CAPs, etc.



Early Market Indicators		Average premium paid for any guaranteed rail freight service purchased for next year	
Area	Share Ordered by March 15	Shuttle/DET	Other Guaranteed
\$ per car			
MN	17%	-68	0
Region	25%	-3	16

Rail Carrier Service Factor Ratings

Railroad	Marketing and Sales Service	Timely Delivery of Equipment	Car Ordering Alternatives/Process	Condition of Equipment	Availability of Order Information	Access to Marketing Personnel	2011 Average
Average Rating, 1=Poor to 5=Excellent							
BNSF	4.0	3.4	4.0	3.6	4.0	3.6	3.8
TCWR	2.8	4.2	3.6	3.4	3.5	3.3	3.5
State, Weighted	3.0	4.1	4.1	3.8	3.5	3.1	3.6

Responses Weighted by Rail Shipments; For fewer than 3 response for railroad rating not included.