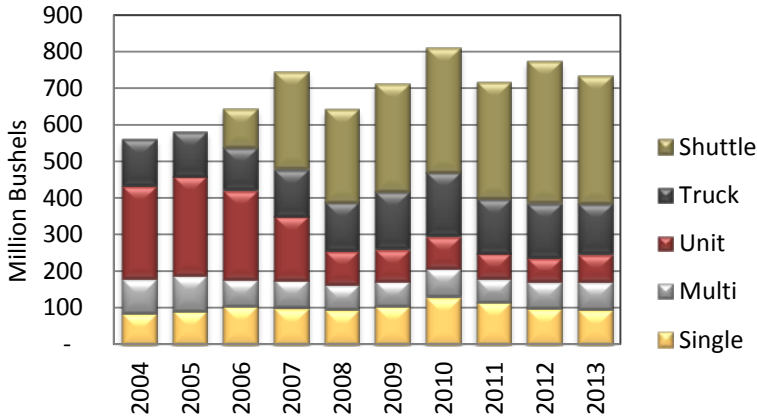


North Dakota Elevators Transportation Activities and Service, 2014 Survey

March 2014

ND Grain & Oilseed Shipments

All Elevators



Destinations Reported

All Elevators

Year	Duluth	MN	Gulf	PNW	ND
2006	6%	22%	8%	34%	13%
2007	6%	20%	8%	35%	15%
2008	2%	19%	6%	38%	19%
2009	5%	21%	6%	32%	20%
2010	5%	16%	8%	29%	22%
2011	3%	16%	8%	32%	21%
2012	2%	14%	10%	32%	19%
2013	2%	13%	11%	30%	18%

Sum Less Than 100% Due to Unknown/Other

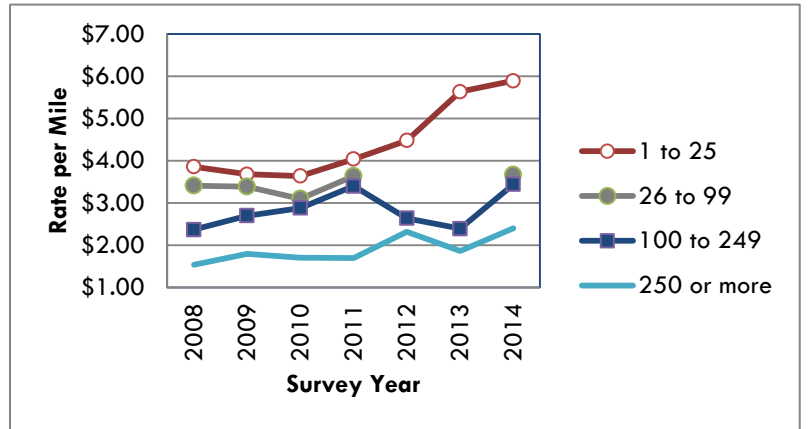
Source: NDPSC Grain Movement Database Summaries

SURVEY RESPONSES

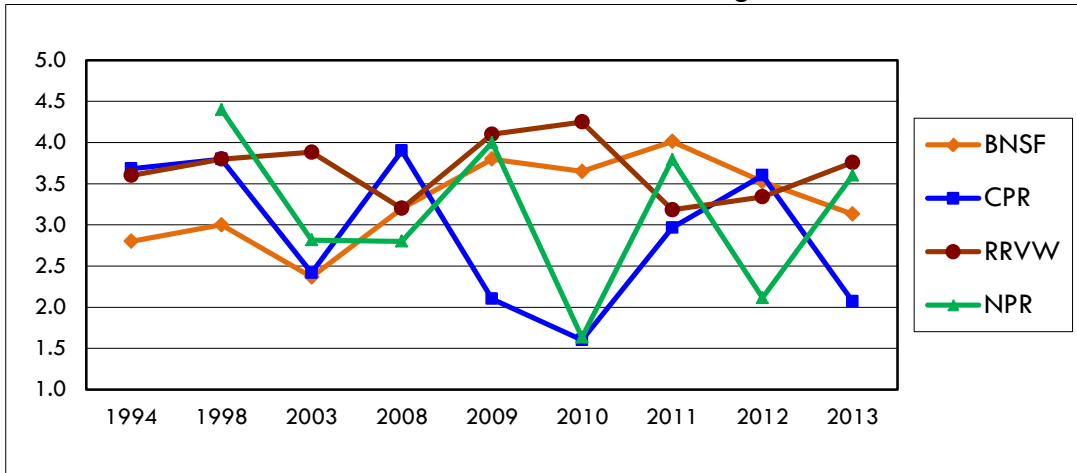
Response Rate: 45%=62 responses of 139 mailed • Location by Region: West=10, Central=15, East=37

Truck Rate Trends

Miles	2010	2011	2012	2013	2014
	\$ per mile				
1 to 25	3.64	0.22	4.48	5.63	5.89
26 to 99	3.10	0.42	n.a.	5.63	3.67
100 to 249	2.88	0.76	2.64	2.39	3.44
250 or more	1.71	1.25	2.32	1.87	2.40



Rail Carrier Service Overall Rating Trends



North Dakota Elevators Transportation Activities and Service, 2014 Survey

March 2014

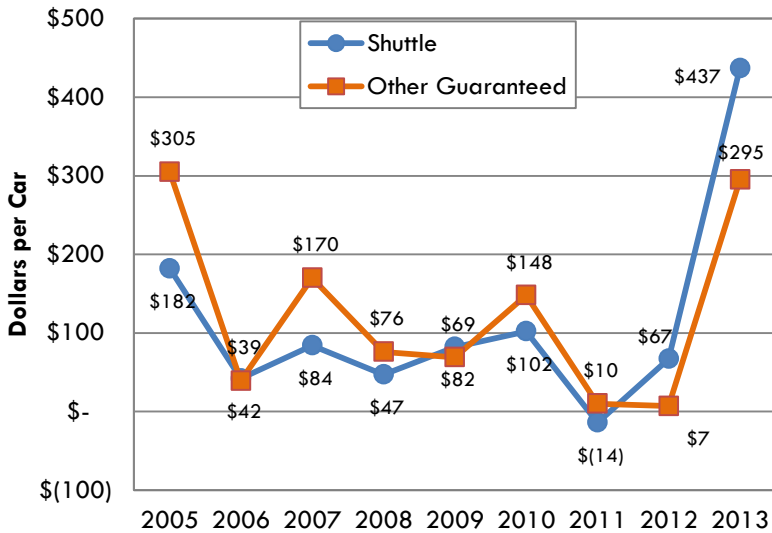
Rail Carrier Service, Current Year Service Factor Ratings
(weighted by rail handle)
1=poor to 5=excellent

Primary Carrier	Marketing and Sales Service	Timely Delivery of Equipment	Car Ordering Alternatives/ Process	Condition of Equipment	Availability of Order Information	Access to Marketing Personnel	Average 2013
BNSF	3.2	2.2	2.9	4.1	3.4	3.1	3.1
CPR	2.2	1.7	2.5	1.4	2.3	2.3	2.1
RRVW	4.0	3.4	4.0	3.6	3.7	4.0	3.8
DMVW							n.a
NPR	4.0	3.9	4.0	2.1	3.0	4.8	3.6
Average	3.3	2.8	3.3	2.8	3.1	3.5	3.1

RAIL PURCHASES AND DELIVERY

(weighted by volume shipped)

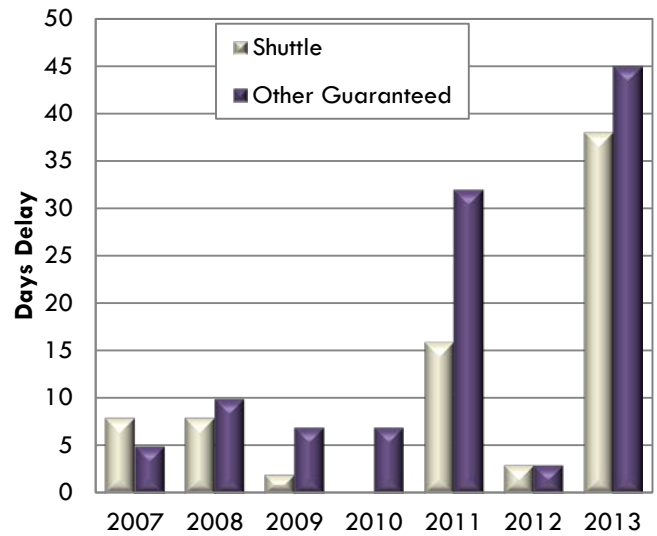
Average Rail Premiums Paid, by Market Year



Range for Rail Premiums

2013 Shuttle: \$0...\$2,500
2013 Other Guaranteed: \$0...\$1,000

Days Delay on Rail Deliveries



Range for Days Delay

Current Shuttle: 0...115 days
Current Other Guaranteed: 0...150 days

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

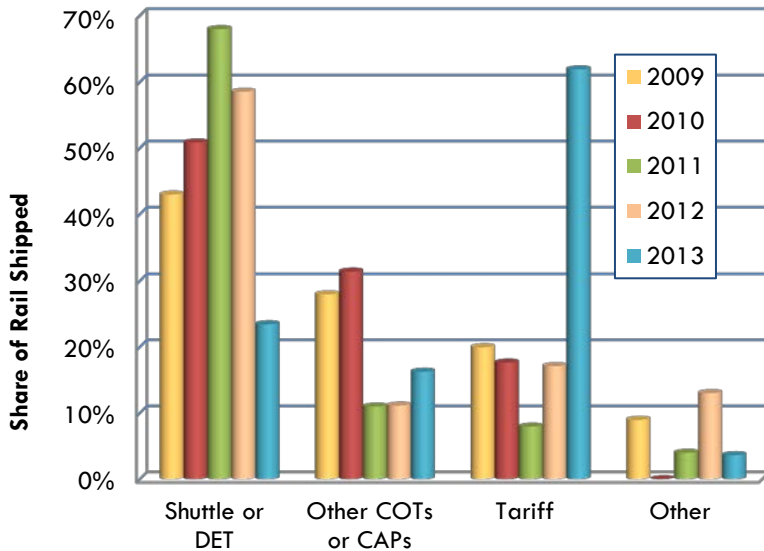
ND Rail Competitiveness Based on Elevators' Marketing Experiences

	PNW Export			Gulf Export			Domestic East			Domestic West		
	More	Same	Less	More	Same	Less	More	Same	Less	More	Same	Less
Wheat	16%	39%	45%	14%	41%	45%	30%	47%	23%	4%	54%	43%
Corn	28%	45%	28%	5%	50%	45%	20%	48%	32%	13%	48%	39%
Soybean	28%	50%	22%	5%	55%	41%	4%	58%	38%	0%	58%	42%

North Dakota Elevators Transportation Activities and Service, 2014 Survey

March 2014

Rail Freight Purchases



Rail Market Indicators

		Average premium paid for any guaranteed rail freight service purchased for next year	
Market Year	Share Ordered by March 15	Shuttle	Other Guaranteed
		\$ per car	
2008	20%	27	53
2009	29%	55	28
2010	49%	32	33
2011	36%	31	81
2012	36%	-42	22
2013	6%	0	1
2014	26%	712	659

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

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