**Minnesota Elevator Transportation Activities and Service, 2012 Survey**

**March 2012**

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**Survey Responses**

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

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**Grain Handle and Storage, by Elevator Type**

- **Truck Only**: 28%
- **1-24 Cars**: 18%
- **25-69 Cars**: 24%
- **70 Cars or More**: 41%

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**Elevator Shipments for Commodities, by Mode**

- **Corn**
  - **Rail**: 42%
  - **Truck**: 58%
- **Soybean**
  - **Rail**: 71%
  - **Truck**: 29%
- **Wheat**
  - **Rail**: 77%
  - **Truck**: 23%

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**Grain Origination, by Distance Hauled**

- **10 or less miles**: 49%
- **11 to 20 miles**: 23%
- **21 to 30 miles**: 10%
- **30 or more miles**: 18%

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

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

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**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

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

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

Guaranteed Rail Service Premiums/Discounts, 2011

- **Area**
  - MN: $24
  - Region: $16
- **Shuttle**
  - MN: $16
  - Region: $12

Range for Rail Premiums

2011 Shuttle: $-230…$250
2011 Other Guaranteed: $0…$200

Online Market Indicators

- **Share Ordered by March 15**
  - MN: 17%
  - Region: 25%
- **Shuttle/DET**
  - MN: -68
  - Region: -3
- **Other Guaranteed**
  - MN: 0
  - Region: 16

Average premium paid for any guaranteed rail freight service purchased for next year:

<table>
<thead>
<tr>
<th>Area</th>
<th>Shuttle/DET</th>
<th>Other Guaranteed</th>
</tr>
</thead>
<tbody>
<tr>
<td>MN</td>
<td>-68</td>
<td>0</td>
</tr>
<tr>
<td>Region</td>
<td>-3</td>
<td>16</td>
</tr>
</tbody>
</table>

Rail Carrier Service Factor Ratings

<table>
<thead>
<tr>
<th>Railroad</th>
<th>Marketing and Sales Service</th>
<th>Timely Delivery of Equipment</th>
<th>Car Ordering Alternatives/Process</th>
<th>Condition of Equipment</th>
<th>Availability of Order Information</th>
<th>Access to Marketing Personnel</th>
</tr>
</thead>
<tbody>
<tr>
<td>BNSF</td>
<td>4.0</td>
<td>3.4</td>
<td>4.0</td>
<td>3.6</td>
<td>4.0</td>
<td>3.6</td>
</tr>
<tr>
<td>TCWR</td>
<td>2.8</td>
<td>4.2</td>
<td>3.6</td>
<td>3.4</td>
<td>3.5</td>
<td>3.3</td>
</tr>
<tr>
<td>State, Weighted</td>
<td>3.0</td>
<td>4.1</td>
<td>4.1</td>
<td>3.8</td>
<td>3.5</td>
<td>3.1</td>
</tr>
</tbody>
</table>

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

**Average Rating, 1=Not Important to 5=Very Important**