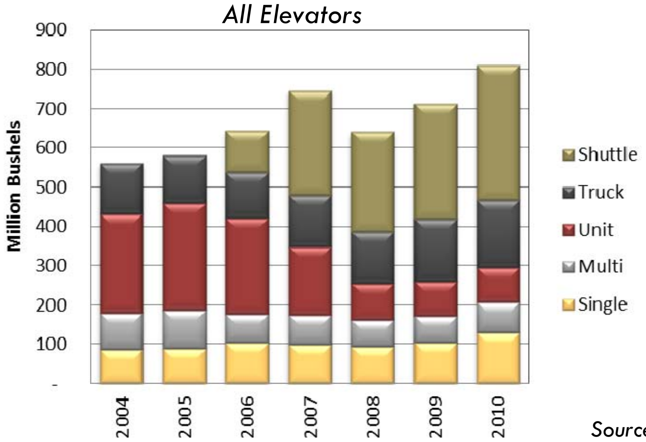
NORTH DAKOTA ELEVATOR ACTIVITIES & TRANSPORTATION SURVEY

March 2011

ND Grain & Oilseed Shipments

All Elevators



Destinations Reported

All Elevators

Year	Duluth	MN	Gulf	PNW	ND
2004	7%	33%	9%	19%	15%
2005	9%	28%	9%	21%	15%
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%

Sum Less Than 100% Due to Unknown/Other

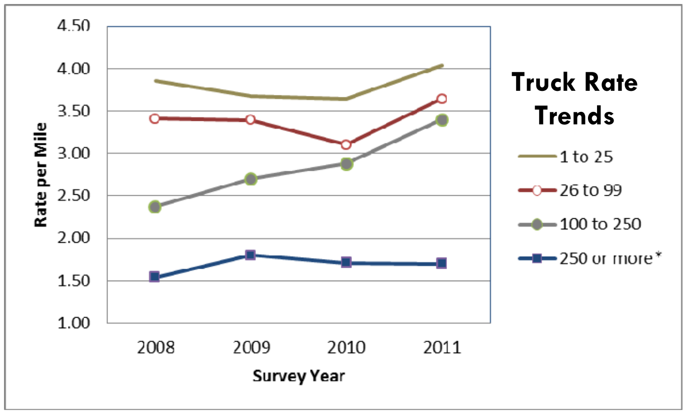
Source: NDPSC Grain Movement Database Summaries

SURVEY RESPONSES

*Response Rate: 63 responses from 145 total mailed = **43%** ● Response Location by Region: West=10, Central=17, East=33*

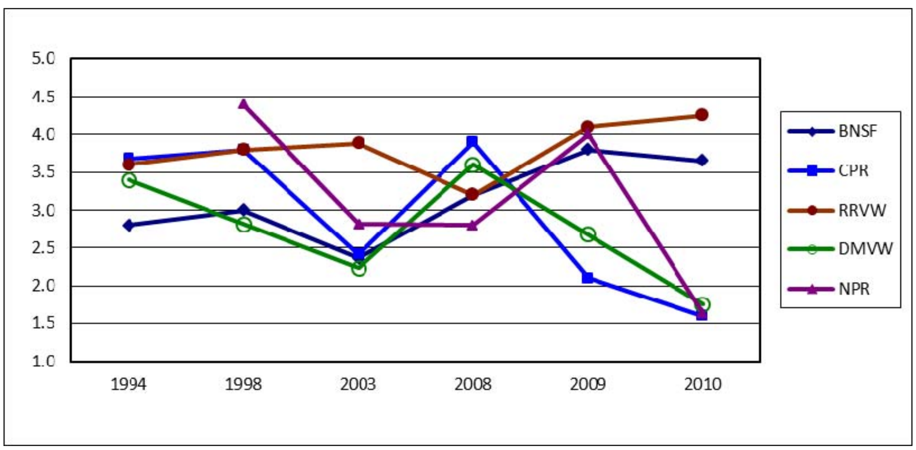
Average Truck Rates, by Distance Range

Miles	2008	2009	2010	2011
	$ per mile			
1 to 25	3.86	3.68	3.64	4.04
26 to 99	3.41	3.39	3.1	3.64
100 to 249	2.37	2.7	2.88	3.4
250 or more	1.54	1.8	1.71	1.7



Rail Carrier Service Overall Rating Trends

(1=poor to 5=excellent)



Rail Carrier Service, Current Year Service Factor Ratings

(weighted by volume shipped)

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 2010
BNSF	3.6	3.1	3.6	3.9	4.0	3.7	3.7
CPR	1.5	1.0	1.9	1.5	1.9	1.8	1.6
RRVW	4.4	3.8	4.0	4.0	4.5	4.8	4.3
DMVW	n.a.	1.0	n.a.	2.0	2.0	2.0	1.8
NPR	1.7	1.0	1.7	2.0	1.7	1.7	1.6
Average	2.8	2.0	2.8	2.7	2.8	2.8	2.6

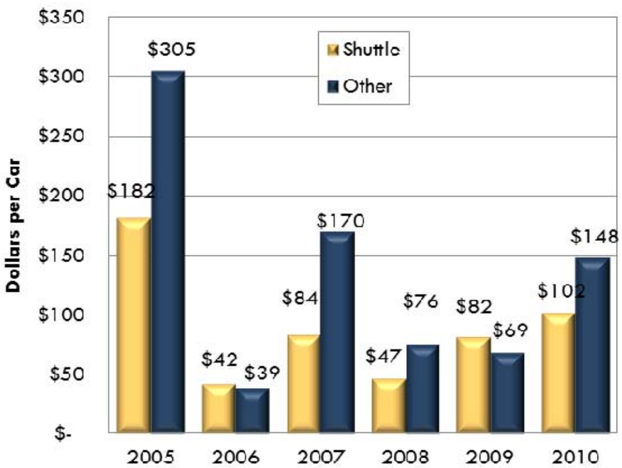
n.a. not available

Funding provided by the North Dakota Wheat Commission

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

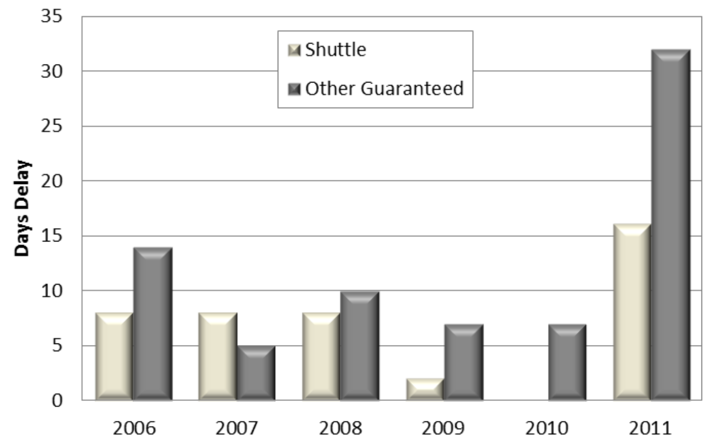
Rail Purchases and Delivery

Average Rail Premiums Paid, by Market Year



Range for Rail Premiums
2010 Shuttle: $-75…$700
2010 Other Guaranteed: $0…$535

Days Delay on Rail Deliveries



Range for Days Delay
Current Shuttle: 0…50 days
Current Other Guaranteed: 7…90 days

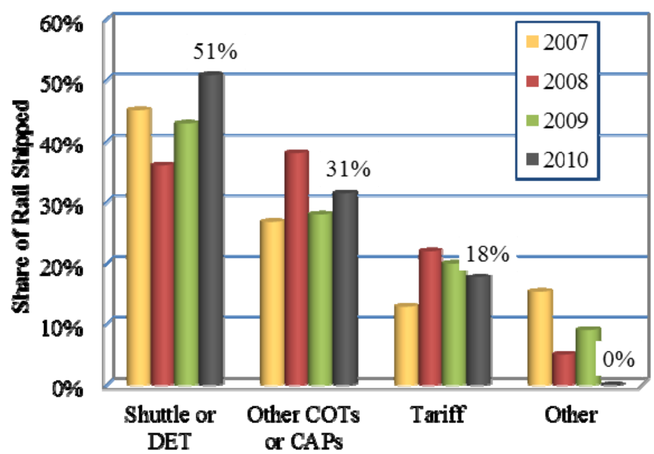
Rail Market Indicators

(weighted by volume shipped)

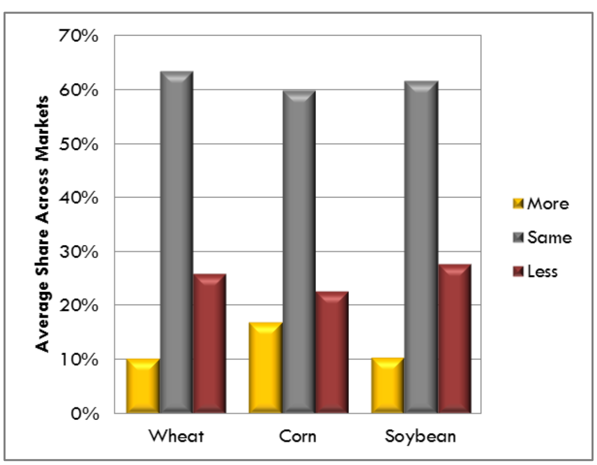
Market Year	Share Ordered by March 15	Shuttle	Other Guaranteed
		$ per car	
2007	24%	22	16
2008	20%	27	53
2009	29%	55	28
2010	49%	32	33
2011	36%	31	82

Program Accessed for Rail Freight Orders

(weighted by volume shipped)



ND Rail Competitiveness



Effects of Shift from Minneapolis to Chicago Gateway

Rail Group	BNSF	CP
Responses	*17*	*13*
Positive	35%	23%
Negative	59%	69%
Neutral	6%	8%

Domestic Efficiency Train (DET) Utilization

DET Use in Marketing	Yes	No
	n=24	
Wheat	24%	76%
Other	4%	96%

ND Rail Competitiveness over Recent Years 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	6%	55%	39%	4%	54%	42%	23%	73%	3%	8%	72%	20%
Corn	25%	46%	29%	6%	59%	35%	15%	79%	5%	22%	56%	22%
Soybean	31%	42%	27%	6%	50%	44%	5%	81%	14%	0%	74%	26%