

# On Time Performance Shipper Perspective Rail Service Survey

Third Quarter 2025: July-September



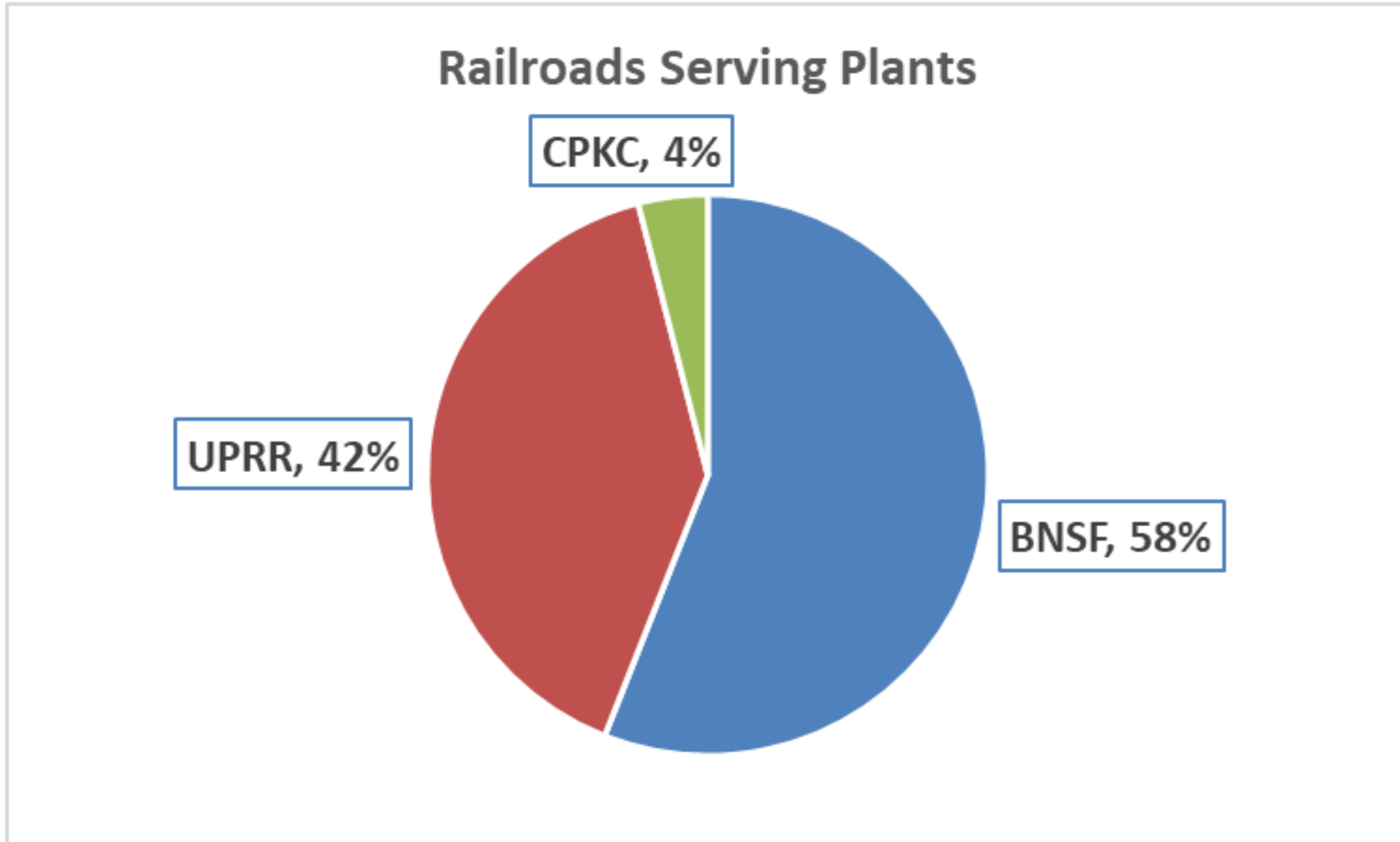
Freight Rail  
Customer Alliance

NCTA

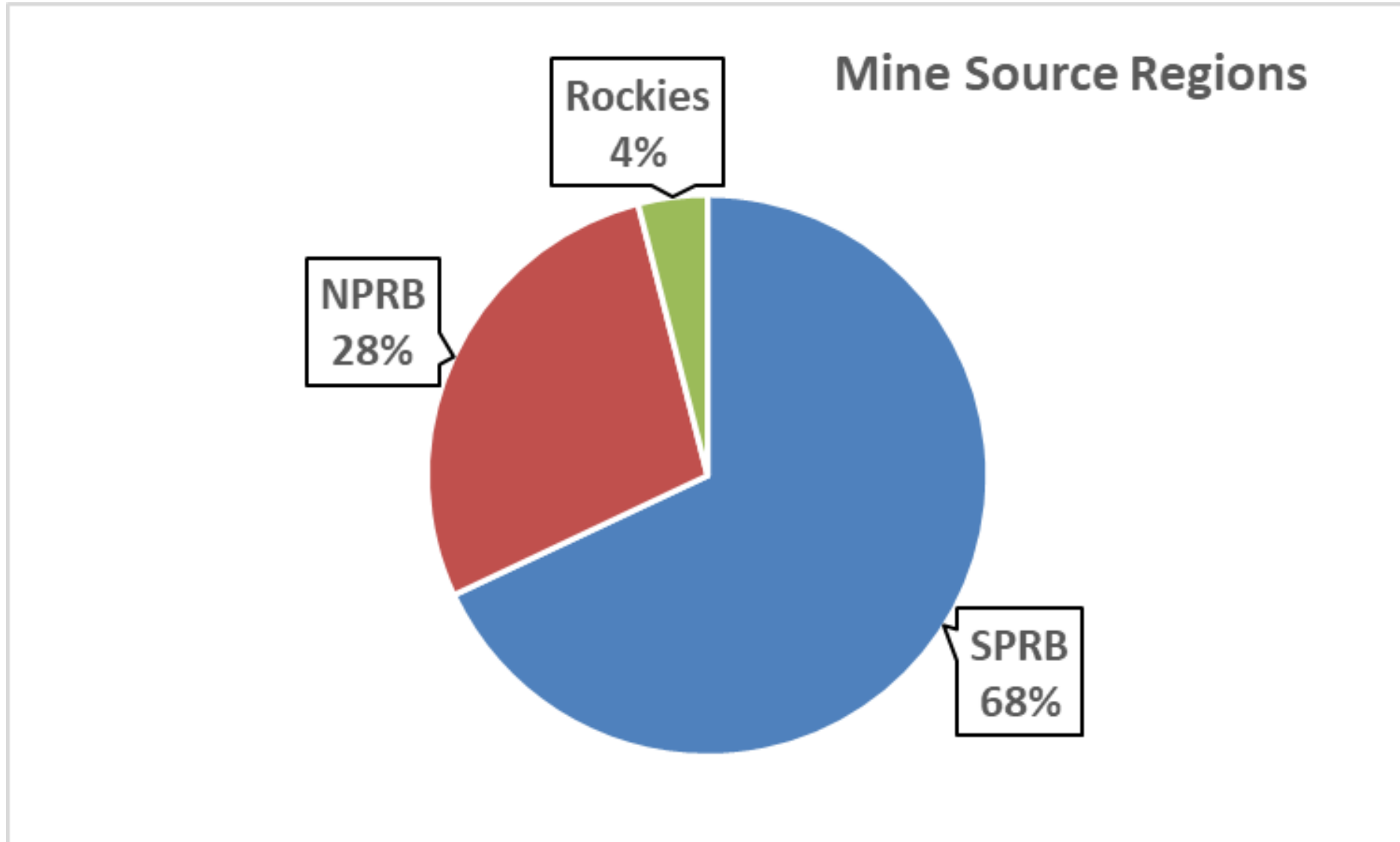


**National Rural Electric  
Cooperative Association**  
A Touchstone Energy® Cooperative 

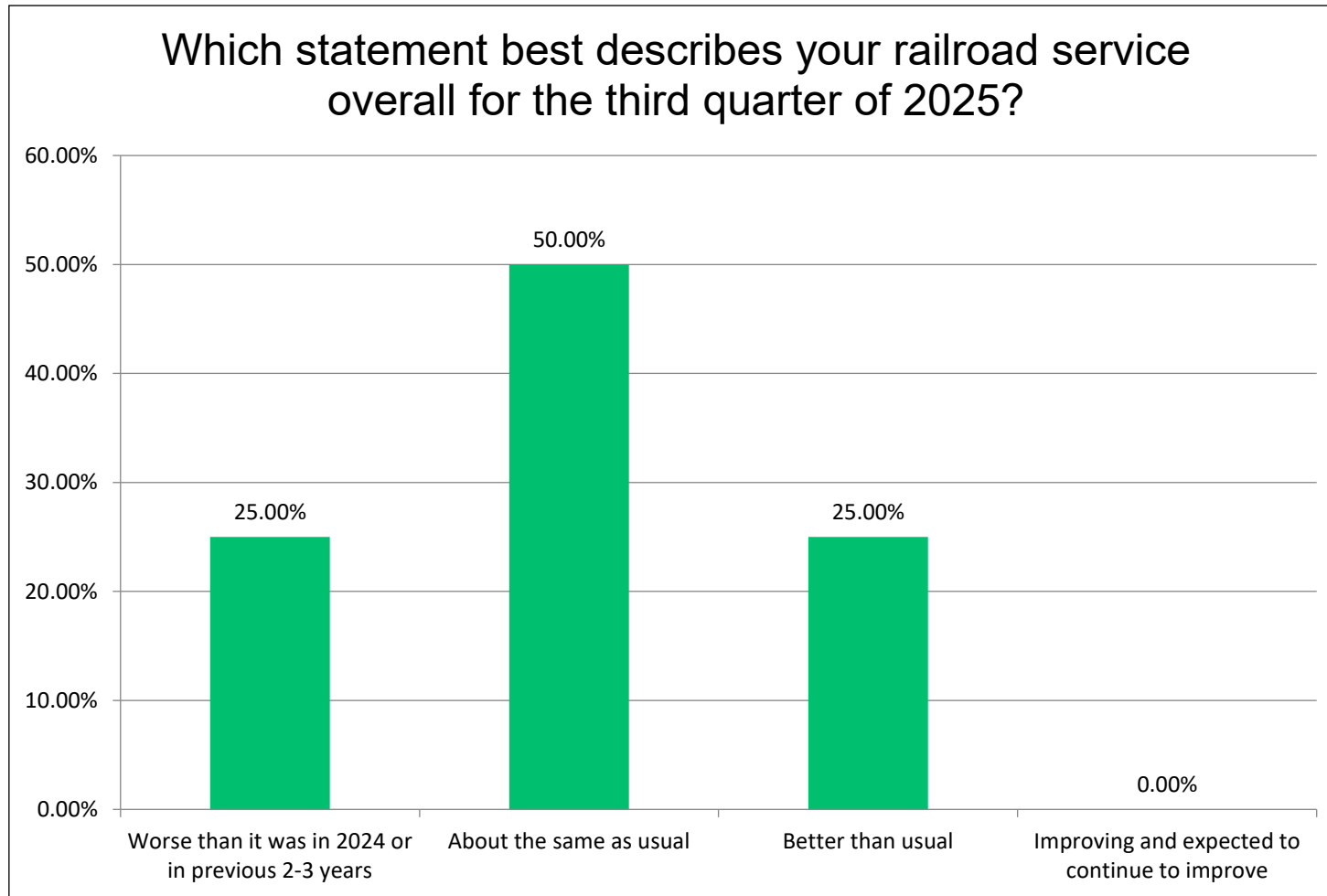
# On Time Performance Utility Shipper Survey July-September 2025: 24 Plants Responded



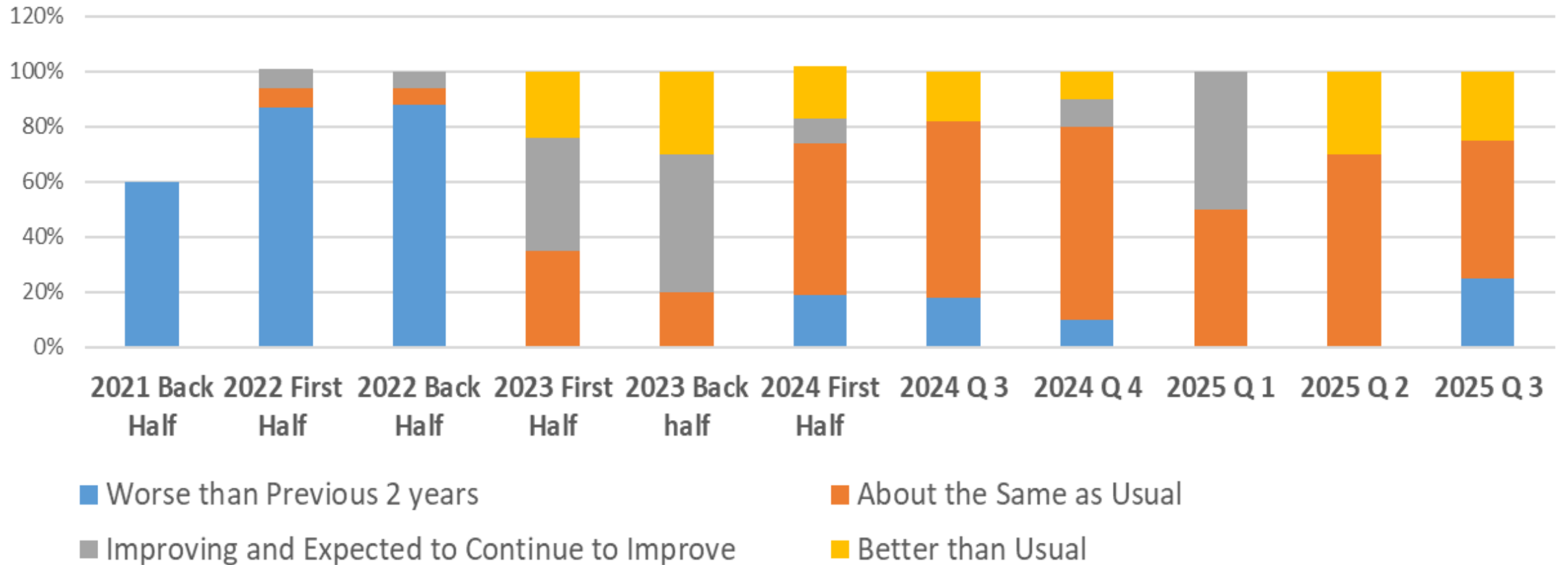
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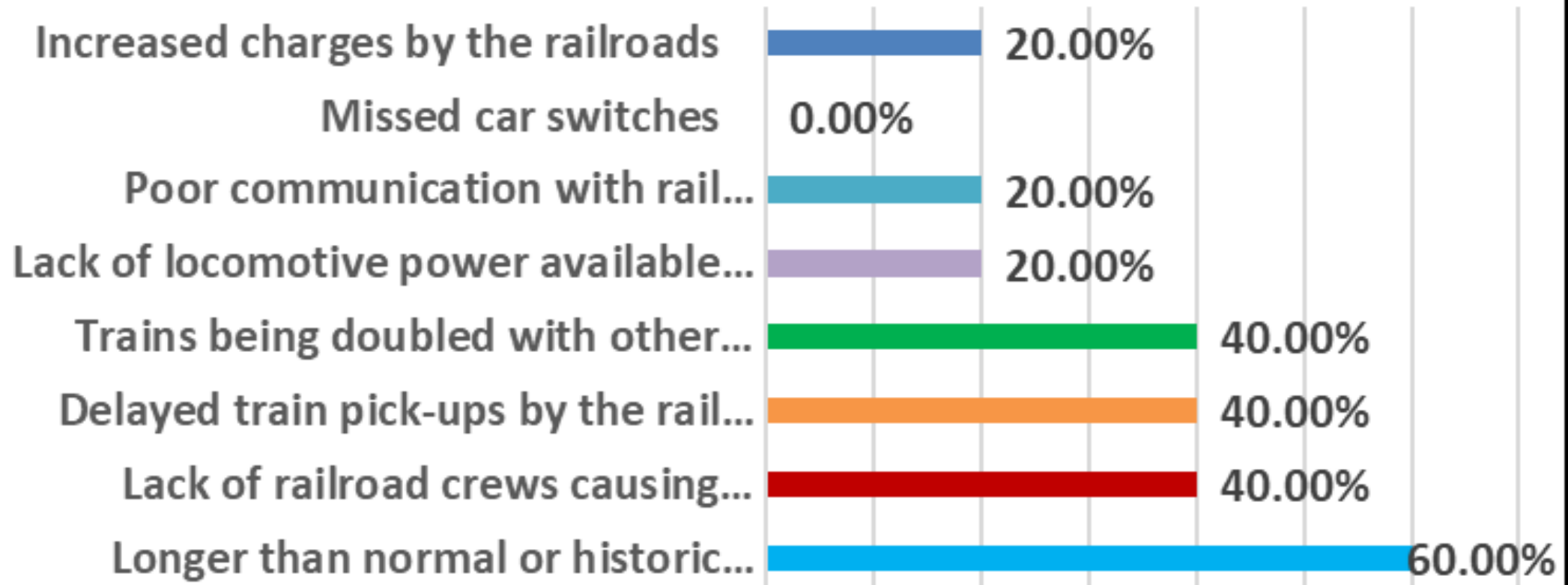
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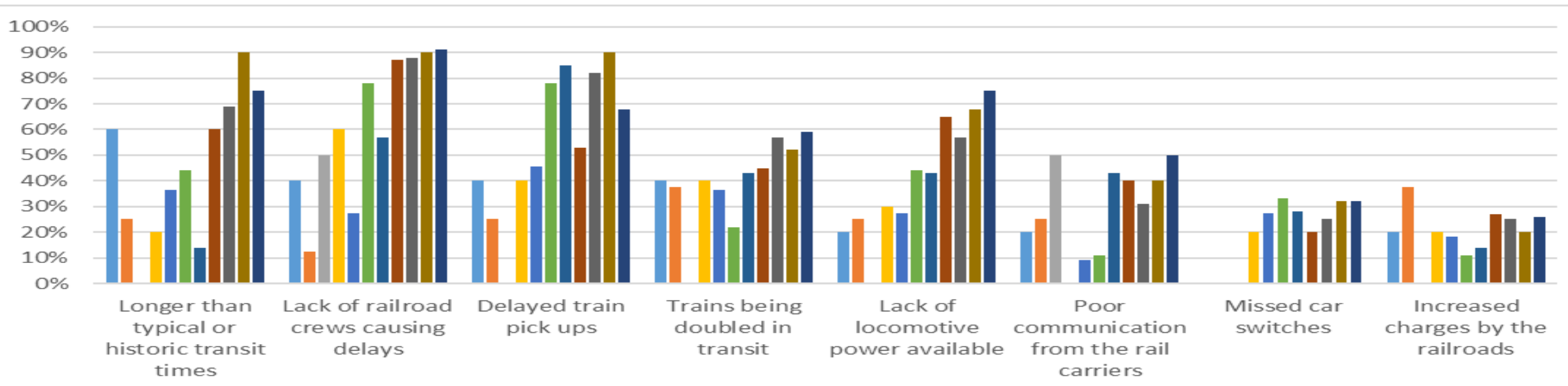
# What Statement Best Describes Rail Service Overall: 2021-2025



**What kind of railroad service issues did you experience in the third quarter of 2025? Check all that apply**



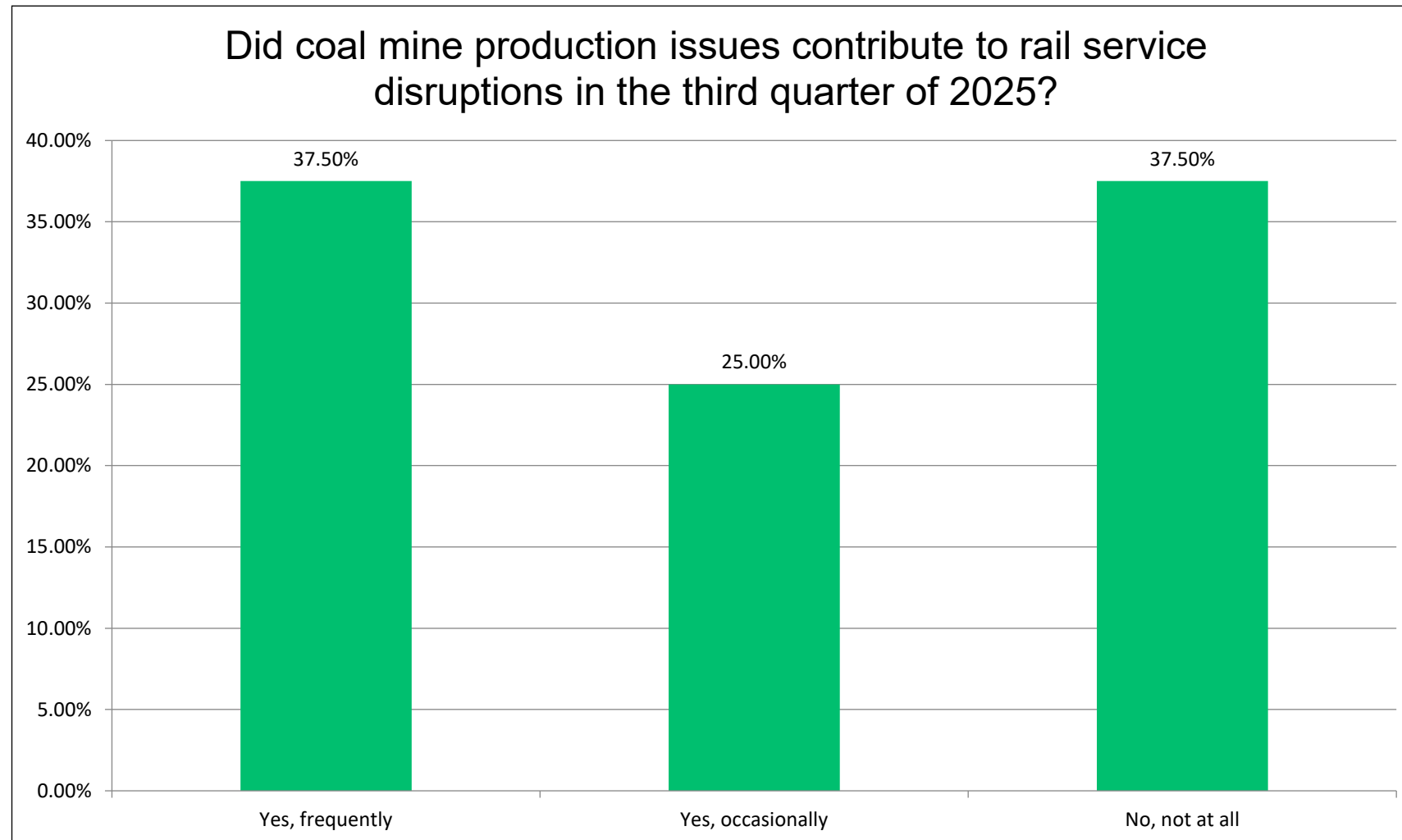
# What Kind of Railroad Service Issues Have You Experienced (check all that apply) July 2021-Oct 2025



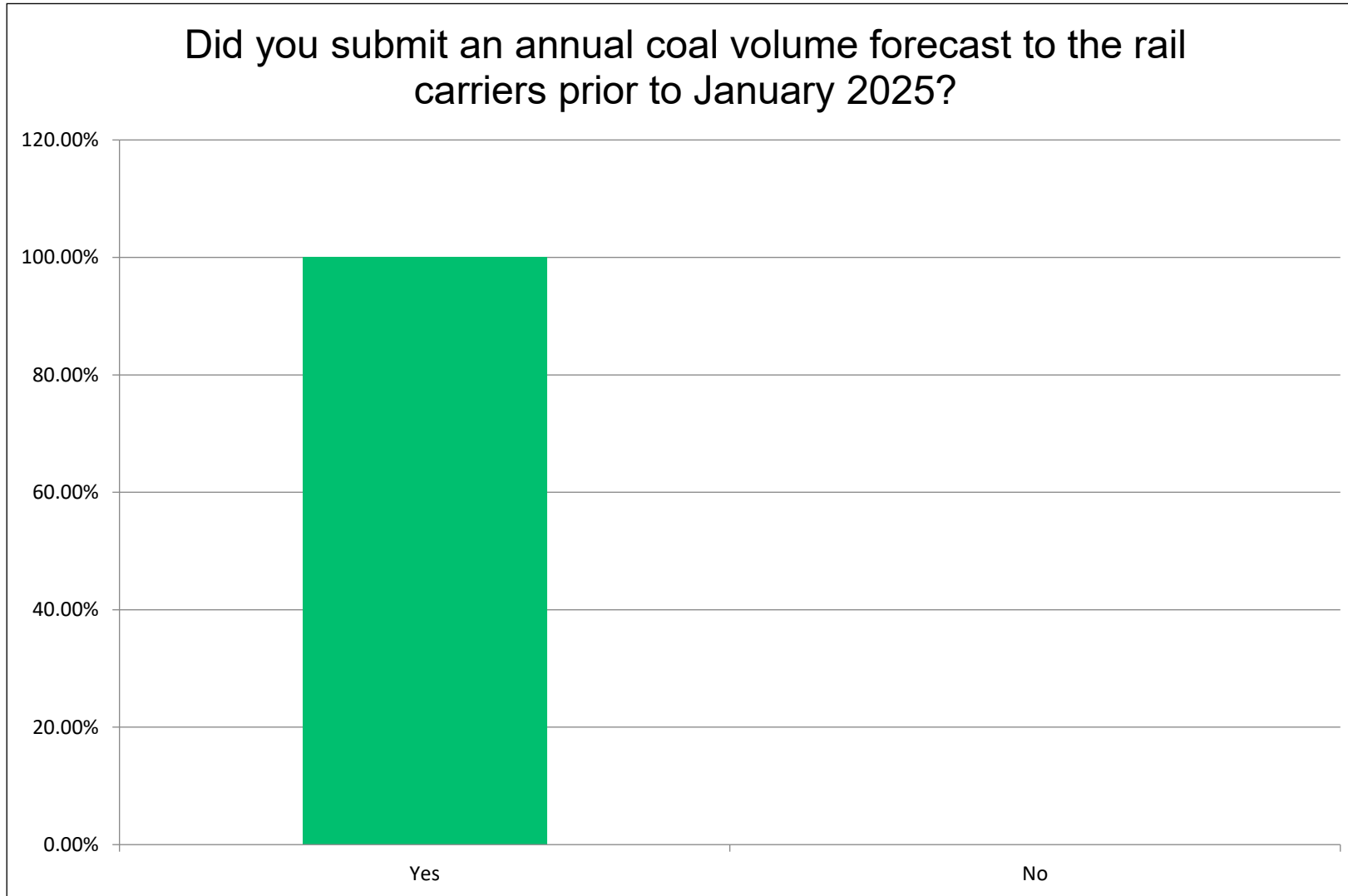
	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
	Longer than typical or historic transit times	Lack of railroad crews causing delays	Delayed train pick ups	Trains being doubled in transit	Lack of locomotive power available	Poor communication from the rail carriers	Missed car switches	Increased charges by the railroads			
■ July 2021-Dec 2021	75%	91%	68%	59%	75%	50%	32%	26%			
■ Jan 2022-June 2022	90%	90%	90%	52%	68%	40%	32%	20%			
■ July 2022-Dec 2022	69%	88%	82%	57%	57%	31%	25%	25%			
■ Jan 2023-June 2023	60%	87%	53%	45%	65%	40%	20%	27%			
■ July 2023-Dec 2023	14%	57%	85%	43%	43%	43%	28%	14%			
■ Jan 2024-June 2024	44%	78%	78%	22%	44%	11%	33%	11%			
■ July 2024-Sept 2024	36%	27%	45%	36%	27%	9%	27%	18%			
■ Oct 2024-Dec 2024	20%	60%	40%	40%	30%	0%	20%	20%			
■ Jan-March 2025	0%	50%	0%	0%	0%	50%	0%	0%			
■ April 2025-June 2025	25%	13%	25%	38%	25%	25%	0%	38%			
■ July 2025-Oct 2025	60%	40%	40%	40%	20%	20%	0%	20%			

■ July 2021-Dec 2021   ■ Jan 2022-June 2022   ■ July 2022-Dec 2022   ■ Jan 2023-June 2023   ■ July 2023-Dec 2023   ■ Jan 2024-June 2024  
 ■ July 2024-Sept 2024   ■ Oct 2024-Dec 2024   ■ Jan-March 2025   ■ April 2025-June 2025   ■ July 2025-Oct 2025

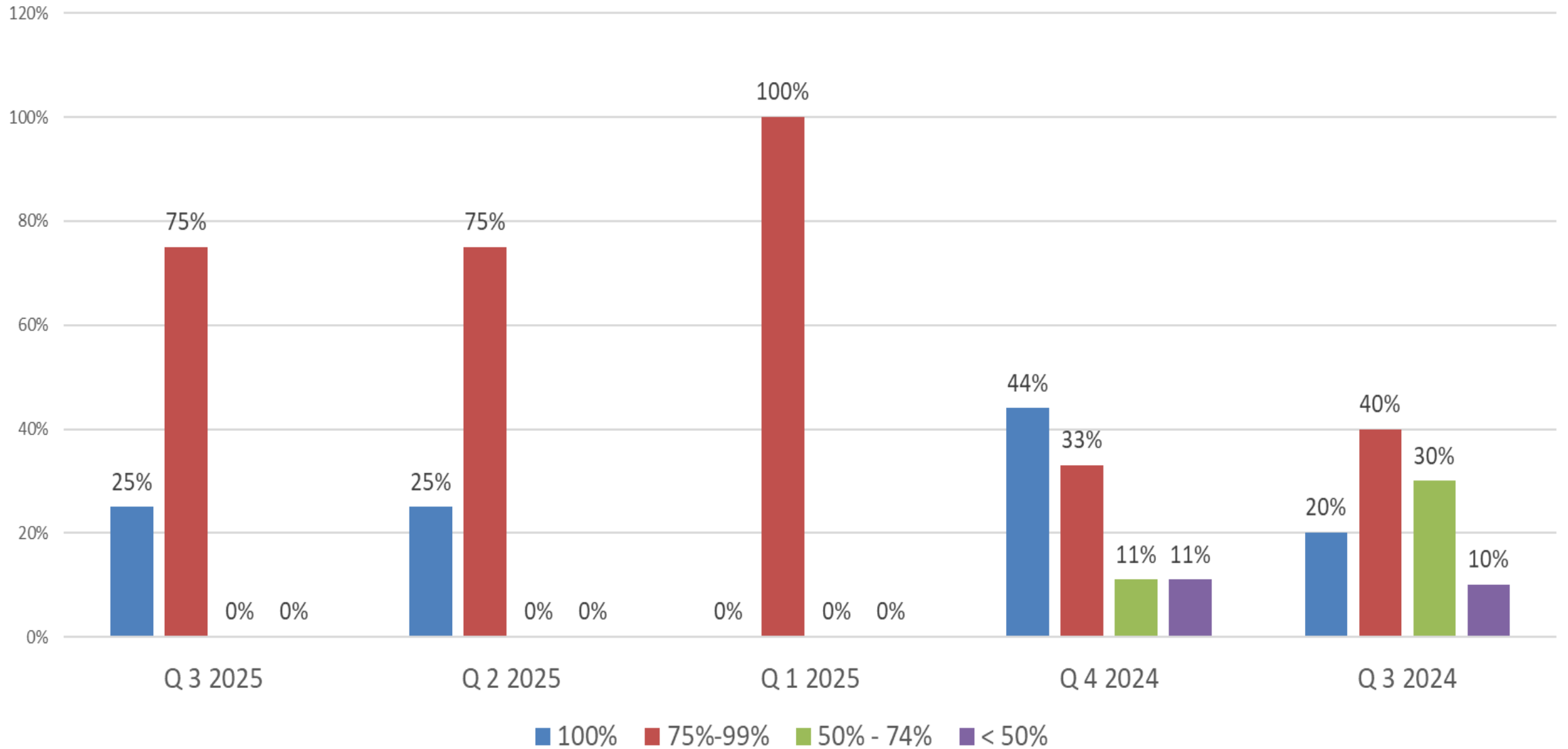
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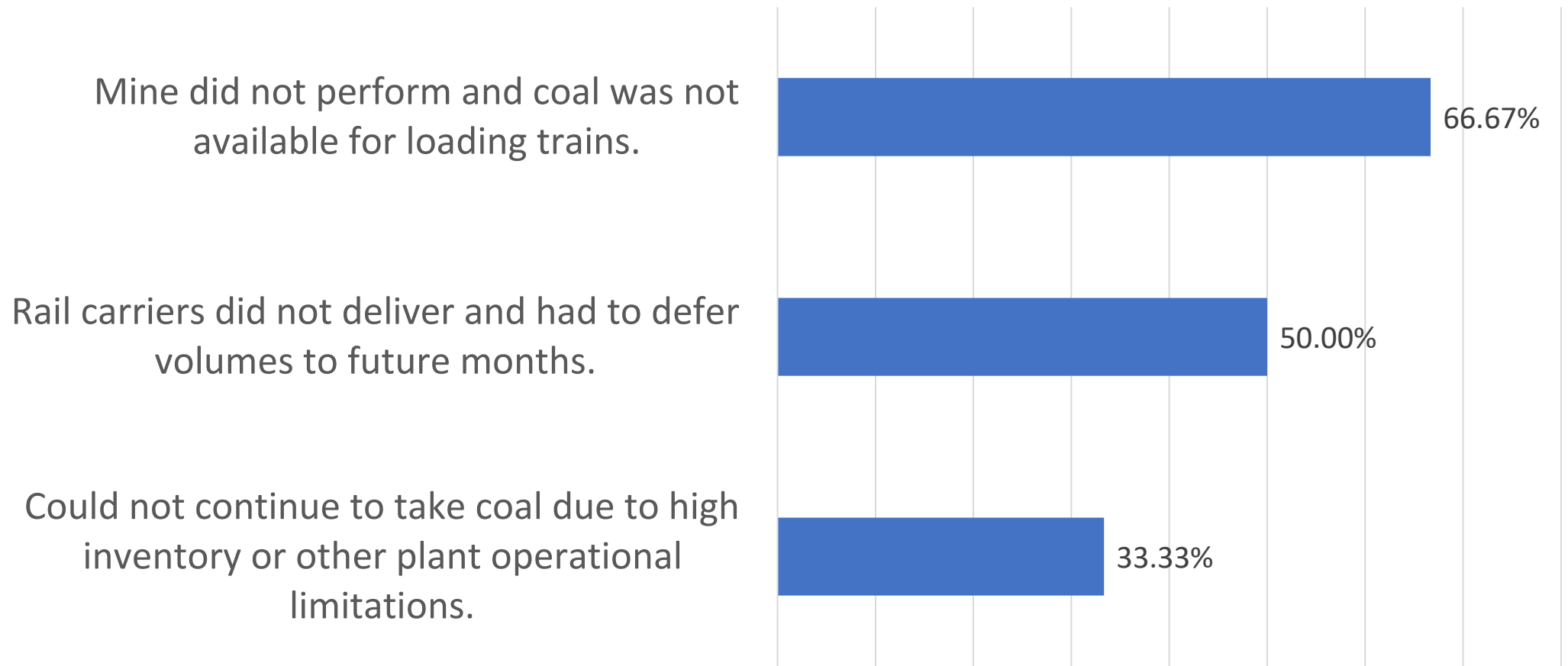
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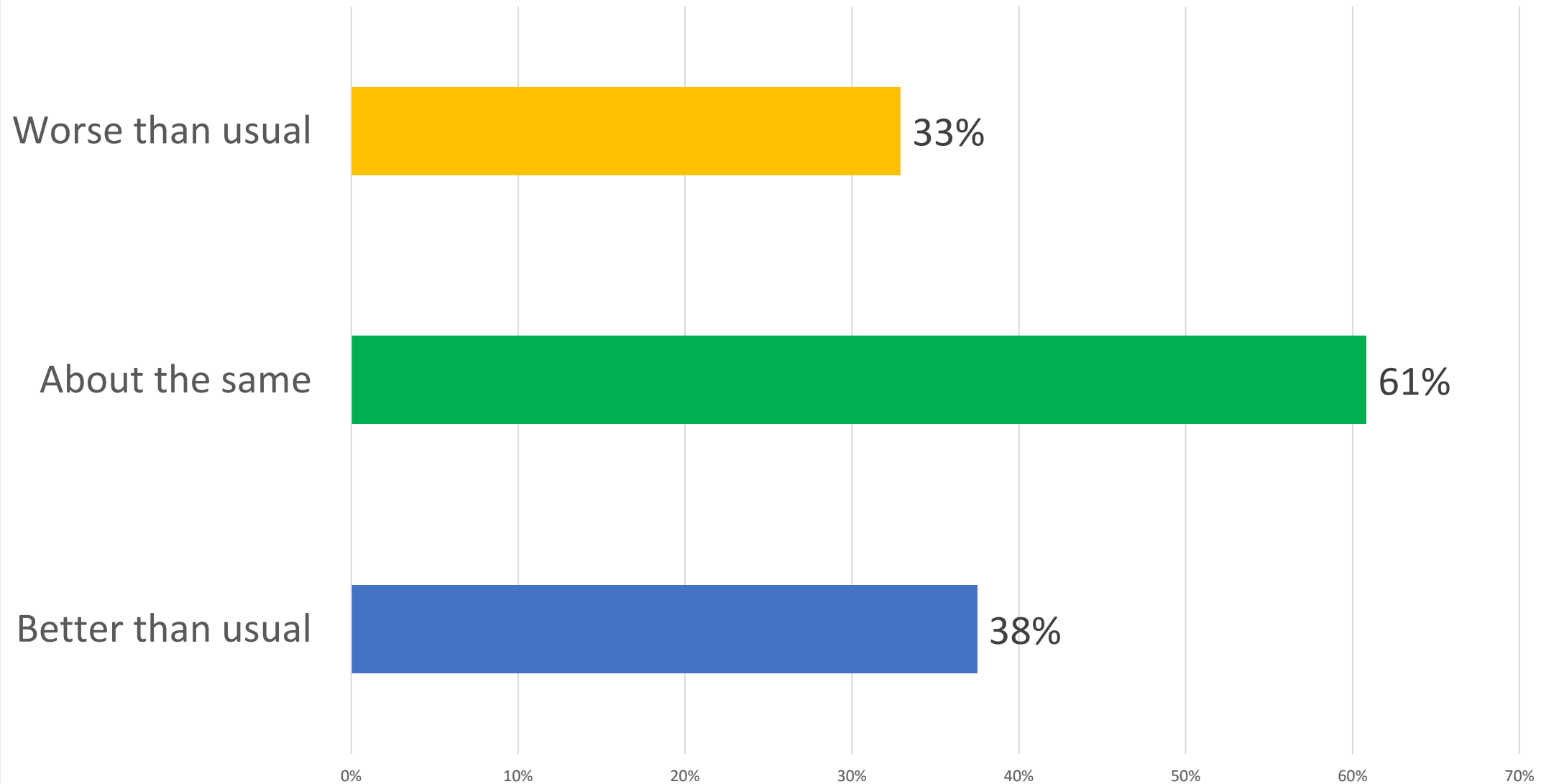
# What percentage of coal volumes that you nominated did you receive?



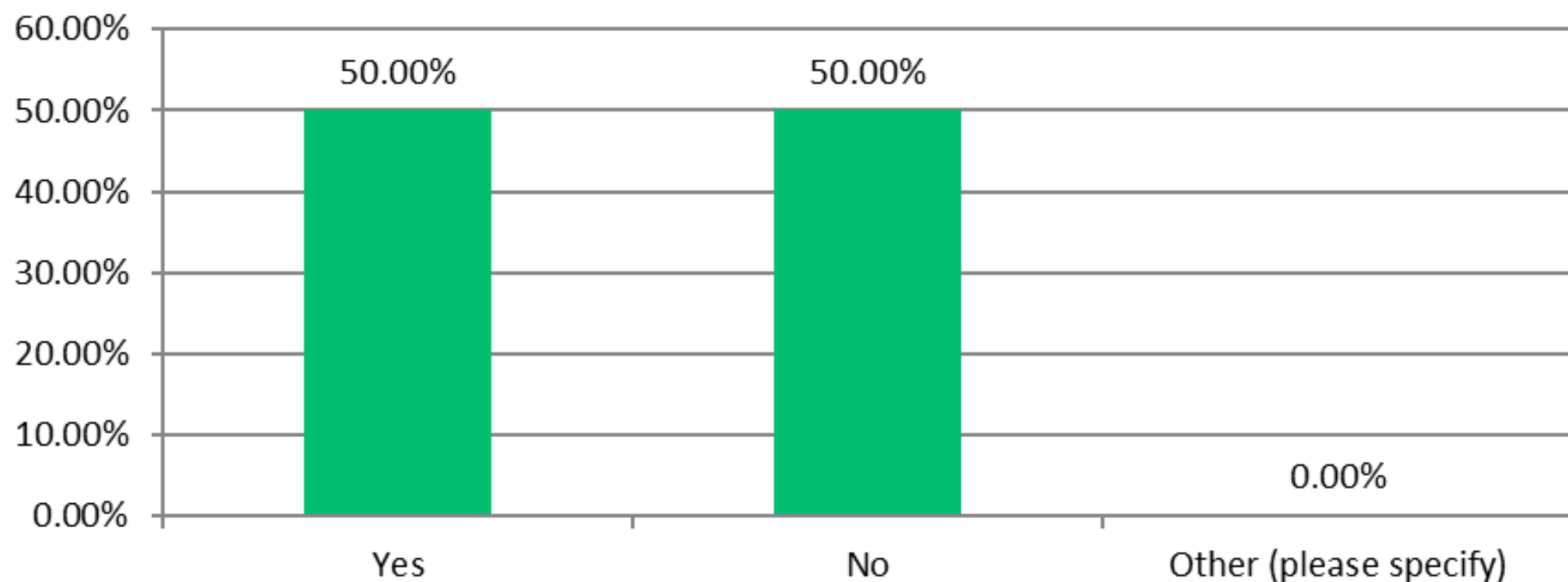
**If you did not receive all of the coal volumes that you nominated in the third quarter of 2025, please share the reason(s). (Check all that apply.)**



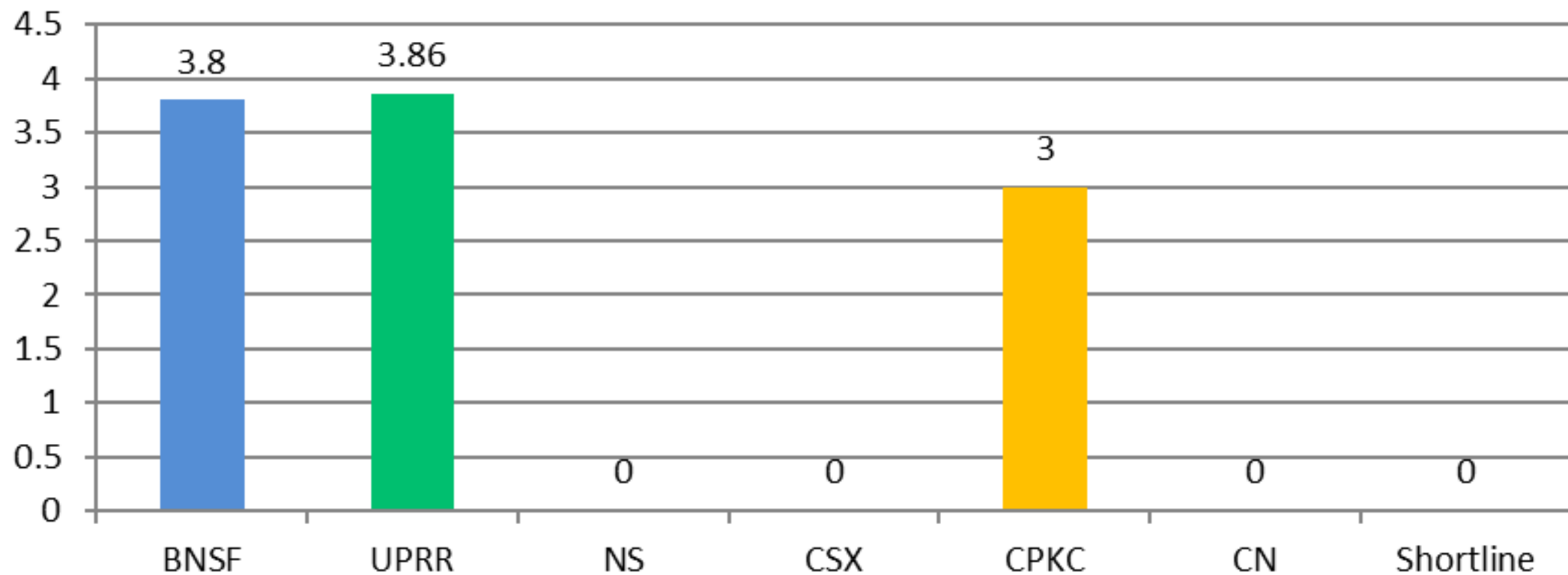
Based on typical train cycle times for your plant(s), please rate your “average round trip cycle time” for each plant for the third quarter of 2025.



Have you experienced increased demurrage and/or equipment dwell charges from the rail carriers in the third quarter of 2025?



On a scale of 1-5 (with 1 being the worst, and 5 being the best), please rate your communications with the rail carriers in the third quarter of 2025.



# Key Takeaways from Q 3 2025

- Rail Service is about the same for 50% of shippers. 25% say service is worse than usual, 25% say Better
- Cycle times are about the same for the majority: 61% but 33% say they have been worse than usual
- Delays with train pick up requests about the same at 40%
- More trains being doubled in transit also about the same: 40%
- Lack of locomotive power down to 20% (was 30%)
- Lack of RR crews available: 40% (Down from 60%)
- Longer than normal or historic cycle times for this quarter: 60%
- Coal Mine Production issues contributing more to coal not being delivered
- Utility inventory less of a cause for coal not being taken