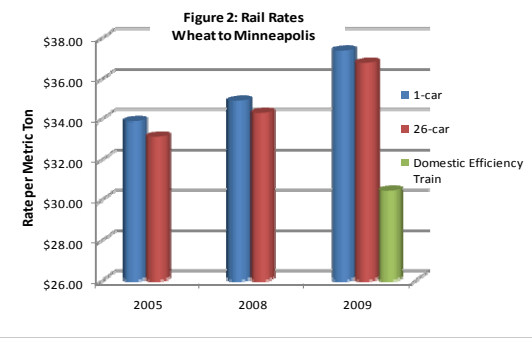
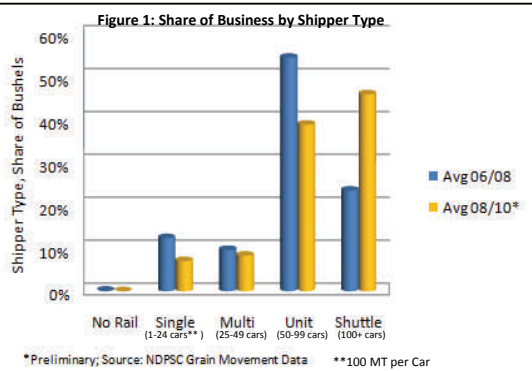


Durum, used primarily for pasta products in the United States, is consumed at a rate of more than 19 lbs. per capita every year. Export demand is based in Europe, North Africa, and Latin America, where durum is used in pasta, bread, and couscous. “Strong demand for excellent durum wheat raw material will persist in the domestic and export markets.” (“Durum Wheat Production”). Logistical data presented in this report reviews trends associated with the movement of durum from elevator to markets. Figure 1 below illustrates a growing tendency over time toward larger shuttle shipments. From 2006-08 to 2008-10 shuttle share increased from 23% to 46% while unit share decreased from 54% to 39% from 2006/08 to 2008/10 respectively.

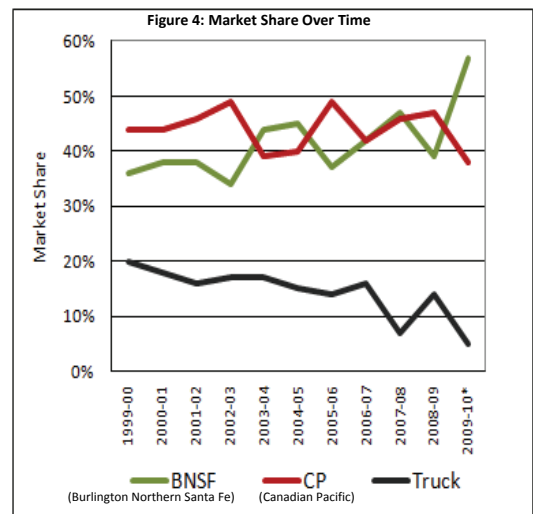
Markets More than 75% of land dedicated to durum wheat in the United States is located in North Dakota, where the annual durum wheat production from 1991 to 2006 averaged 2.1 million metric tons. At an average annual value of \$388 million, durum remains highly important to the state of North Dakota (“Durum Wheat Production”).

Destination statistics reveal that, for the last decade, durum from North Dakota elevators has consistently favored the Duluth and Minneapolis markets with individual shares ranging from 20 to 30 percent. Their combined market share since 1999 has ranged from 40 to 50 percent. (see figure 3 below). Minneapolis shipments typically move beyond the gateway to U.S. domestic millers. The Duluth shipments are destined for major export customers in Europe and North Africa. Overall destination percentages remain fairly consistent for all ports. CRD origin detail for these markets is provided on page 2.



Year	Duluth	Mpls	Other MN & WI	Midland & Gulf	ND	Other	Total
1999-00	13%	34%	6%	15%	19%	13%	64,056
2000-01	13%	28%	10%	18%	16%	15%	77,025
2001-02	25%	26%	9%	9%	20%	9%	61,242
2002-03	18%	26%	10%	17%	24%	6%	45,327
2003-04	17%	28%	11%	23%	15%	7%	53,946
2004-05	15%	27%	10%	21%	18%	8%	42,953
2005-06	23%	24%	15%	17%	13%	8%	57,993
2006-07	24%	22%	10%	17%	20%	7%	40,850
2007-08	36%	20%	8%	17%	11%	6%	47,900
2008-09	13%	29%	7%	25%	22%	4%	21,911
2009-10*	37%	21%	8%	16%	9%	8%	31,058

*Preliminary



Rail Market Shares Two major railroads provide service to North Dakota: Burlington Northern Santa Fe (BNSF) and Canadian Pacific (CP). Figure 4 (lower right) shows the trends in market shares for BNSF* and CP** rail lines, as well as trucks, for durum shipped from North Dakota elevators. BNSF has shown a sharp increase in the last year after an irregular trend towards increase, moving from 39% in 2008-09 to 57% in the preliminary 2009-10 figures. CP market shares have fluctuated, but show a decline between 1999 and 2010 with percentages of 44% and 38% respectively. The truck share has shown a fairly steady decline from a 1999 share of 20% to just 5% in the preliminary 2010 figures for shipments from ND elevators for the 2009/10 marketing year.

*Includes RRWV **Includes DMVW and NPR

Destinations for Durum Shipments from ND CRD's

(1000 Bushels)**

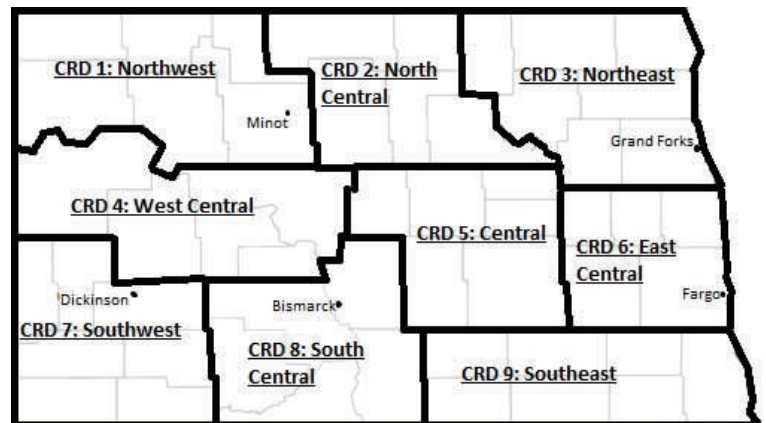
CRD 1							CRD 2								
Year	Duluth	MN/WI	Midland	PNW	ND	Other	Total	Year	Duluth	MN/WI	Midland	PNW	ND	Other	Total
2000-01	12%	34%	27%	3%	20%	4%	39,479	2000-01	25%	39%	5%	9%	17%	4%	5,751
2001-02	28%	28%	10%	2%	29%	2%	34,509	2001-02	33%	48%	1%	3%	11%	3%	4,392
2002-03	21%	24%	21%	0%	32%	2%	29,854	2002-03	32%	44%	0%	0%	15%	8%	2,146
2003-04	18%	24%	32%	1%	19%	5%	31,759	2003-04	37%	45%	0%	0%	17%	0%	2,478
2004-05	15%	25%	27%	0%	25%	7%	26,849	2004-05	27%	23%	14%	0%	12%	24%	1,884
2005-06	24%	33%	21%	1%	13%	7%	38,091	2005-06	37%	20%	6%	0%	24%	13%	2,120
2006-07	27%	22%	22%	0%	24%	6%	25,451	2006-07	25%	48%	8%	1%	19%	0%	1,729
2007-08	40%	23%	20%	0%	11%	5%	33,798	2007-08	5%	35%	0%	0%	25%	33%	1,404
2008-09	16%	34%	26%	0%	21%	3%	16,797	2008-09	1%	28%	4%	0%	66%	1%	584
2009-10*	46%	24%	14%	1%	8%	6%	22,079	2009-10*	50%	7%	0%	0%	44%	0%	364

CRD 3							CRD 4								
Year	Duluth	MN/WI	Midland	PNW	ND	Other	Total	Year	Duluth	MN/WI	Midland	PNW	ND	Other	Total
2000-01	26%	26%	8%	2%	17%	22%	8,864	2000-01	6%	17%	9%	2%	14%	53%	8,838
2001-02	41%	18%	3%	1%	9%	29%	6,251	2001-02	12%	28%	18%	0%	21%	21%	5,095
2002-03	31%	40%	2%	0%	13%	14%	2,535	2002-03	1%	36%	24%	0%	16%	23%	3,752
2003-04	15%	50%	15%	0%	8%	12%	4,187	2003-04	7%	63%	16%	0%	10%	4%	5,305
2004-05	42%	31%	3%	0%	12%	11%	1,818	2004-05	0%	63%	27%	0%	6%	4%	5,088
2005-06	42%	13%	1%	0%	27%	18%	1,877	2005-06	6%	57%	21%	0%	13%	4%	5,776
2006-07	33%	13%	4%	2%	27%	21%	1,556	2006-07	0%	53%	14%	2%	27%	3%	4,119
2007-08	16%	17%	0%	0%	20%	46%	887	2007-08	2%	42%	24%	0%	32%	0%	3,450
2008-09	1%	13%	65%	0%	14%	7%	508	2008-09	0%	41%	26%	0%	33%	0%	1,620
2009-10*	7%	26%	0%	0%	34%	33%	51	2009-10*	7%	69%	12%	0%	11%	0%	2,145

CRD 5							CRD 6								
Year	Duluth	MN/WI	Midland	PNW	ND	Other	Total	Year	Duluth	MN/WI	Midland	PNW	ND	Other	Total
2000-01	17%	49%	15%	1%	11%	8%	3,393	2000-01	27%	35%	8%	0%	1%	30%	1,899
2001-02	15%	52%	11%	13%	2%	7%	2,600	2001-02	44%	31%	2%	6%	1%	16%	752
2002-03	14%	51%	11%	0%	6%	19%	1,444	2002-03	14%	84%	0%	0%	1%	1%	160
2003-04	10%	54%	9%	0%	12%	15%	2,390	2003-04	21%	18%	0%	0%	62%	0%	272
2004-05	5%	52%	10%	0%	10%	24%	1,388	2004-05	18%	79%	0%	0%	3%	0%	453
2005-06	6%	62%	8%	0%	14%	10%	1,635	2005-06	20%	80%	0%	0%	0%	0%	144
2006-07	8%	64%	2%	0%	24%	2%	1,156	2006-07	8%	41%	0%	0%	51%	0%	31
2007-08	29%	47%	4%	0%	10%	11%	1,215	2007-08	2%	71%	0%	0%	2%	25%	138
2008-09	3%	47%	0%	0%	24%	25%	440	2008-09	0%	0%	0%	0%	0%	0%	-
2009-10*	19%	18%	8%	0%	10%	45%	538	2009-10*	0%	0%	0%	0%	100%	0%	48

CRD 7							CRD 8								
Year	Duluth	MN/WI	Midland	PNW	ND	Other	Total	Year	Duluth	MN/WI	Midland	PNW	ND	Other	Total
2000-01	2%	81%	11%	1%	2%	3%	7,601	2000-01	5%	90%	0%	0%	4%	0%	514
2001-02	0%	78%	13%	2%	3%	5%	6,910	2001-02	2%	92%	0%	0%	5%	0%	348
2002-03	0%	84%	7%	7%	1%	0%	5,216	2002-03	0%	100%	0%	0%	0%	0%	110
2003-04	13%	68%	8%	5%	1%	5%	7,099	2003-04	0%	92%	3%	0%	5%	0%	185
2004-05	12%	60%	14%	1%	9%	4%	7,544	2004-05	0%	64%	1%	0%	35%	0%	199
2005-06	23%	59%	5%	2%	6%	4%	8,128	2005-06	0%	98%	0%	0%	0%	2%	132
2006-07	32%	52%	7%	1%	1%	7%	6,445	2006-07	0%	98%	0%	0%	4%	0%	68
2007-08	41%	44%	9%	1%	0%	4%	6,567	2007-08	0%	100%	0%	0%	0%	0%	85
2008-09	11%	51%	24%	1%	4%	11%	1,781	2008-09	0%	70%	0%	0%	30%	0%	56
2009-10*	22%	48%	12%	3%	0%	15%	3,741	2009-10*	0%	75%	0%	0%	25%	0%	34

CRD 9							
Year	Duluth	MN/WI	Midland	PNW	ND	Other	Total
2000-01	24%	52%	0%	0%	1%	23%	687
2001-02	10%	70%	8%	0%	2%	10%	380
2002-03	8%	85%	0%	0%	5%	2%	110
2003-04	2%	68%	2%	0%	11%	16%	271
2004-05	2%	64%	0%	0%	2%	33%	314
2005-06	7%	93%	0%	0%	0%	0%	89
2006-07	0%	94%	0%	0%	5%	1%	293
2007-08	0%	100%	0%	0%	0%	0%	356
2008-09	0%	96%	0%	0%	11%	0%	124
2009-10*	39%	31%	14%	1%	8%	7%	29



Map of North Dakota Crop Reporting Districts

*Results are preliminary

**One metric ton = 36.74 Bushels

Patterns and methods of shipping Durum per the Annual North Dakota Elevator Marketing Report and the North Dakota Grain And Oilseed Transportation Statistics report. The complete reports and additional market information are available at <http://www.ugpti.org/resources/grain/>.

NDSU Agriculture and University Extension, n.d. Durum Wheat Production. Accessed online June 23, 2010, at <http://www.ag.ndsu.nodak.edu/plantsci/breeding/durum/production.htm>

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