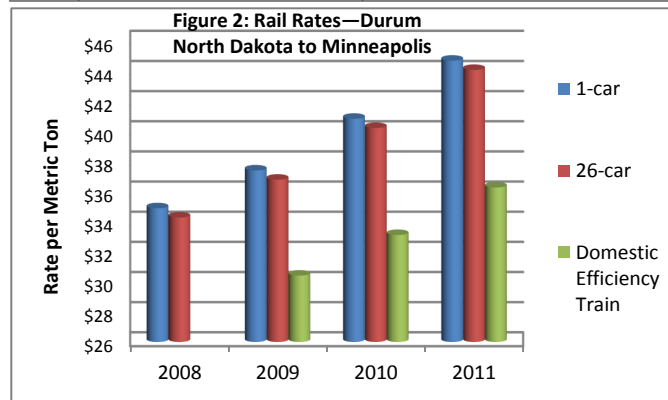
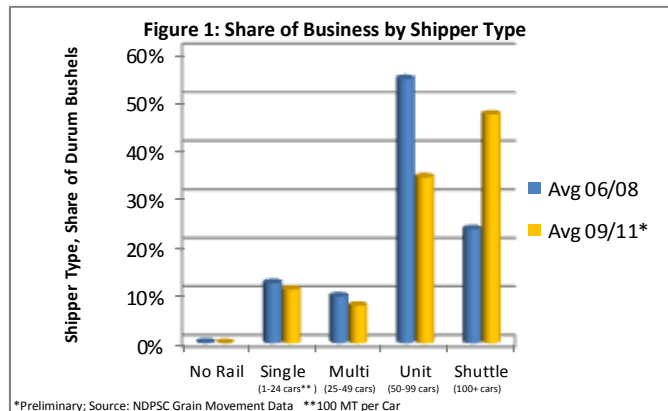


Annual U.S. durum production is around 2.3 million metric tons. More than 75% of land dedicated to durum wheat in the United States is located in North Dakota, followed by Montana, California, and Arizona.

Logistical data presented in this report reviews trends associated with the movement of durum from North Dakota elevators to markets. Figure 1 below illustrates a growing tendency over time toward larger shuttle shipments. From 2006-08 to 2009-11 shuttle share increased from 23% to 47%, while during the same time unit share decreased from 54% to 34%.



**Rail Market Shares** Two major railroads provide service to North Dakota: Burlington Northern Santa Fe (BNSF) and Canadian Pacific (CP). Figure 4 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 two years after an irregular trend towards increase, moving from 39% in 2008-09 to 58% in 2010-11. CP market shares have fluctuated, but show a decline between 1999 and 2011 with percentages of 44% and 30% respectively. The truck share has shown a fairly steady decline from a 1999 share of 20% to just 11% in 2011 for shipments from ND elevators.

\*Includes RRVW \*\*Includes DMVW and NPR

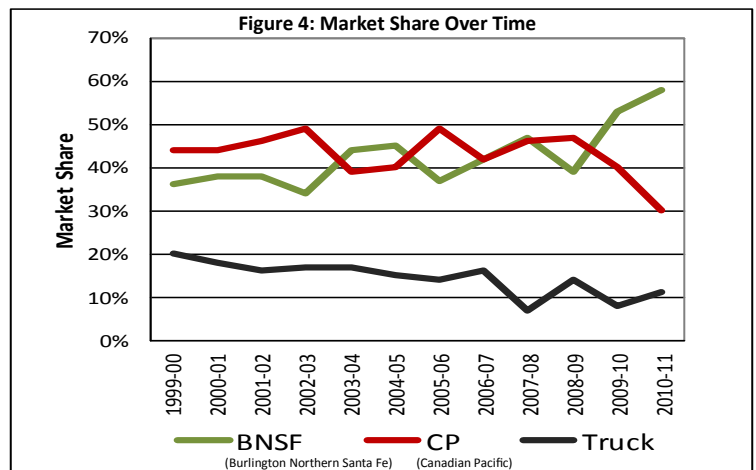
## Markets

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.

Destination statistics (Figure 3) 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%. Their combined market share since 2000 has ranged from 40% to 50%. 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, along with a world map depicting top markets and export points.

**Figure 3: Destination for Durum Originating from ND Elevators**  
ND PSC Grain Movement Summary, June-July Market Year  
1,000 Bushels

	Duluth	Mpls	Other MN & WI	Midland & Gulf	ND	Other	Total
Previous 5 Yr Avg	19%	26%	11%	18%	18%	8%	52,805
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	32%	20%	9%	16%	11%	10%	42,698
2010-11	33%	14%	7%	14%	15%	17%	52,786



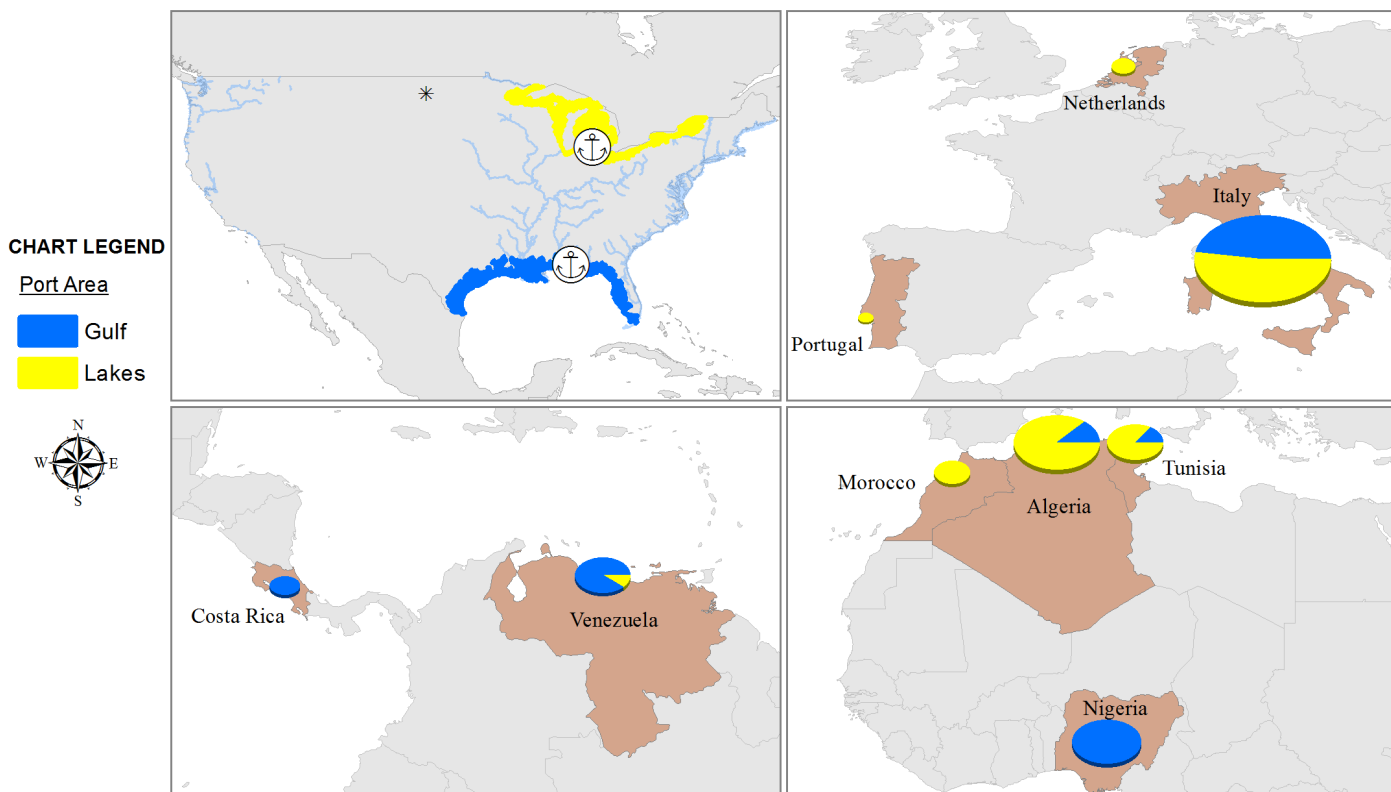
**Destinations for Durum Shipments from ND CRD's**  
(1000 Bushels)\*\*

CRD 1 - Northwest								CRD 2 - North Central							
	Duluth	MN/WI	Midland	PNW	ND	Other	Total		Duluth	MN/WI	Midland	PNW	ND	Other	Total
Previous 5 Yr Avg	21%	27%	22%	1%	24%	5%	32,212	Previous 5 Yr Avg	33%	36%	4%	1%	16%	10%	2,600
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	39%	23%	16%	3%	11%	8%	30,675	2009-10	18%	39%	1%	0%	41%	2%	1,116
2010-11	44%	11%	16%	1%	13%	15%	34,073	2010-11	3%	23%	4%	0%	57%	13%	2,400
CRD 3 - Northeast								CRD 4 - West Central							
	Duluth	MN/WI	Midland	PNW	ND	Other	Total		Duluth	MN/WI	Midland	PNW	ND	Other	Total
Previous 5 Yr Avg	34%	30%	5%	0%	14%	17%	3,334	Previous 5 Yr Avg	5%	49%	21%	0%	13%	11%	5,003
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	2%	53%	0%	0%	13%	32%	145	2009-10	4%	51%	23%	1%	20%	1%	3,406
2010-11	10%	29%	0%	5%	20%	36%	975	2010-11	1%	37%	17%	0%	26%	19%	5,084
CRD 5 - Central								CRD 6 - East Central							
	Duluth	MN/WI	Midland	PNW	ND	Other	Total		Duluth	MN/WI	Midland	PNW	ND	Other	Total
Previous 5 Yr Avg	10%	54%	10%	3%	9%	15%	1,891	Previous 5 Yr Avg	23%	58%	0%	1%	13%	3%	356
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%	0
2009-10	16%	24%	6%	0%	11%	43%	683	2009-10	0%	0%	0%	0%	85%	15%	56
2010-11	28%	14%	21%	0%	6%	31%	1,485	2010-11	0%	0%	0%	0%	0%	0%	0
CRD 7 - Southwest								CRD 8 - South Central							
	Duluth	MN/WI	Midland	PNW	ND	Other	Total		Duluth	MN/WI	Midland	PNW	ND	Other	Total
Previous 5 Yr Avg	10%	70%	9%	3%	4%	4%	6,979	Previous 5 Yr Avg	0%	89%	1%	0%	9%	0%	195
2006-07	32%	52%	7%	1%	1%	7%	6,445	2006-07	0%	96%	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	16%	44%	16%	3%	2%	19%	6,564	2009-10	0%	84%	0%	0%	16%	0%	53
2010-11	20%	49%	7%	2%	4%	17%	8,730	2010-11	16%	84%	0%	0%	0%	0%	30
CRD 9 - Southeast															
	Duluth	MN/WI	Midland	PNW	ND	Other	Total								
Previous 5 Yr Avg	6%	76%	2%	0%	4%	12%	233								
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	0%	0%	0%	0%	0%	0%	0								
2010-11	0%	79%	0%	0%	21%	0%	9								

\*\*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, CRD map, and additional market information are available at <http://www.ugpti.org/resources/grain/>.

**Durum Export by Region and Port Area**



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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The content of this report reflects the views of authors, who are responsible for facts and accuracy of the information. This document is disseminated under the sponsorship of the ND Wheat Commission.



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