

DURUM

U.S. Durum production is around 2.3 million metric tons. Approximately 70% 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 shows a continuing trend toward larger rail shipments in the durum market. Shuttle facilities share during the 2013-15 time frame was 52% while unit train facilities held a 28% share. Increases in rail rates to Minneapolis for singles, 26 cars, and DETs are noted in 2015 (Figure 2).

Figure 1: Share of Business by Shipper Type

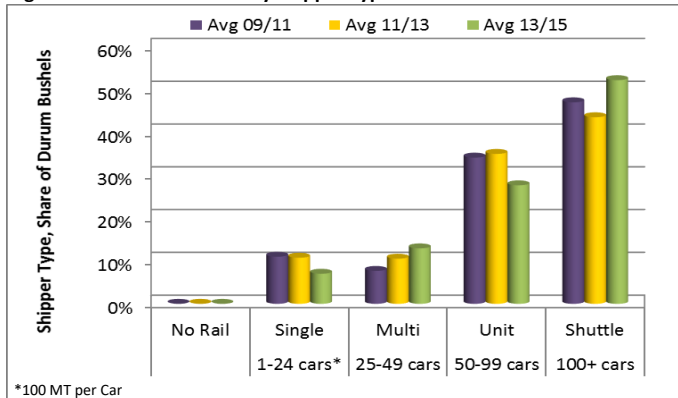
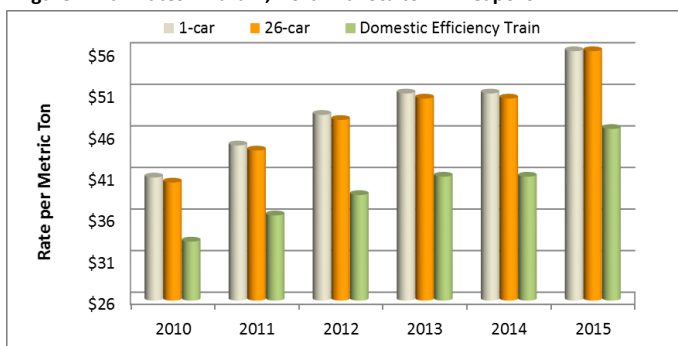


Figure 2: Rail Rates—Durum, North Dakota to Minneapolis



Rail Market Shares Burlington Northern Santa Fe (BNSF*) and Canadian Pacific (CP**) are the two major railroads providing service to North Dakota. Market share trends for these two railroads, as well as trucks, are shown in Figure 4. BNSF continues to hold the largest share, more than 50% in each of the last six years. CP increased its share to 25% in the 2014-15 crop year. The current year truck share shows little change.

*Includes RRW **Includes DMVW and NPR

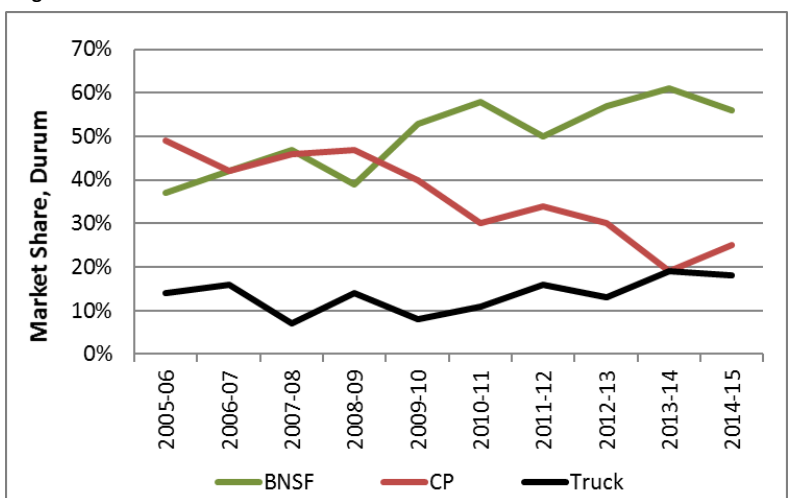
Markets Durum, used primarily for pasta products in the United States, is consumed at a rate of more than 19 lbs. per capita every year. Export demand is based in Europe, North Africa, and Latin America, where durum is used in pasta, bread, and couscous.

Destination data (Figure 3) reveal that durum from North Dakota elevators moved in largest share to Duluth. The Duluth shipments are destined for major export customers in Europe and North Africa. Minneapolis and Midland shipments typically move beyond the gateway to U.S. domestic millers. The destination patterns in 2014-15 show a decreased share to the Other MN & WI area offsetting a similar increase in share to Duluth and Minneapolis. Shipments to local markets were in line with the 5-year average. Overall destination percentages remain fairly consistent for all ports. Crop reporting district (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

| | Duluth | Mpls | Other MN & WI | Midland & Gulf | ND | Other | Total |
|-------------------|--------|------|---------------|----------------|-----|-------|--------|
| Previous 5 Yr Avg | 26% | 23% | 10% | 19% | 15% | 7% | 42,271 |
| 2010-11 | 33% | 14% | 7% | 14% | 15% | 17% | 52,786 |
| 2011-12 | 16% | 14% | 8% | 20% | 25% | 16% | 24,249 |
| 2012-13 | 16% | 16% | 13% | 19% | 22% | 13% | 38,496 |
| 2013-14 | 21% | 11% | 14% | 22% | 16% | 11% | 34,587 |
| 2014-15 | 25% | 15% | 7% | 21% | 16% | 15% | 25,216 |

Figure 4: Market Share Over Time



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 | 29% | 27% | 21% | 1% | 16% | 6% | 28,962 | Previous 5 Yr Avg | 17% | 34% | 4% | 0% | 35% | 10% | 1,391 |
| 2010-11 | 44% | 11% | 16% | 1% | 13% | 15% | 34,073 | 2010-11 | 3% | 23% | 4% | 0% | 57% | 13% | 2,400 |
| 2011-12 | 20% | 19% | 20% | 2% | 28% | 10% | 14,862 | 2011-12 | 12% | 12% | 0% | 0% | 60% | 15% | 816 |
| 2012-13 | 21% | 23% | 23% | 1% | 26% | 6% | 24,535 | 2012-13 | 1% | 21% | 0% | 0% | 57% | 21% | 1,127 |
| 2013-14 | 26% | 23% | 24% | 7% | 16% | 4% | 24,577 | 2013-14 | 6% | 39% | 0% | 0% | 53% | 2% | 732 |
| 2014-15 | 30% | 14% | 27% | 2% | 17% | 9% | 18,366 | 2014-15 | 0% | 54% | 1% | 0% | 30% | 15% | 341 |

| 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 | 19% | 22% | 14% | 0% | 20% | 25% | 995 | Previous 5 Yr Avg | 2% | 49% | 22% | 1% | 25% | 2% | 3,674 |
| 2010-11 | 10% | 29% | 0% | 5% | 20% | 36% | 975 | 2010-11 | 1% | 37% | 17% | 0% | 26% | 19% | 5,084 |
| 2011-12 | 3% | 24% | 5% | 5% | 25% | 37% | 578 | 2011-12 | 3% | 9% | 46% | 0% | 36% | 6% | 2,821 |
| 2012-13 | 4% | 35% | 0% | 0% | 35% | 25% | 764 | 2012-13 | 2% | 0% | 28% | 0% | 20% | 50% | 2,576 |
| 2013-14 | 41% | 10% | 6% | 0% | 31% | 11% | 378 | 2013-14 | 0% | 10% | 14% | 0% | 38% | 39% | 1,496 |
| 2014-15 | 30% | 18% | 1% | 0% | 36% | 16% | 552 | 2014-15 | 3% | 11% | 9% | 0% | 10% | 68% | 1,109 |

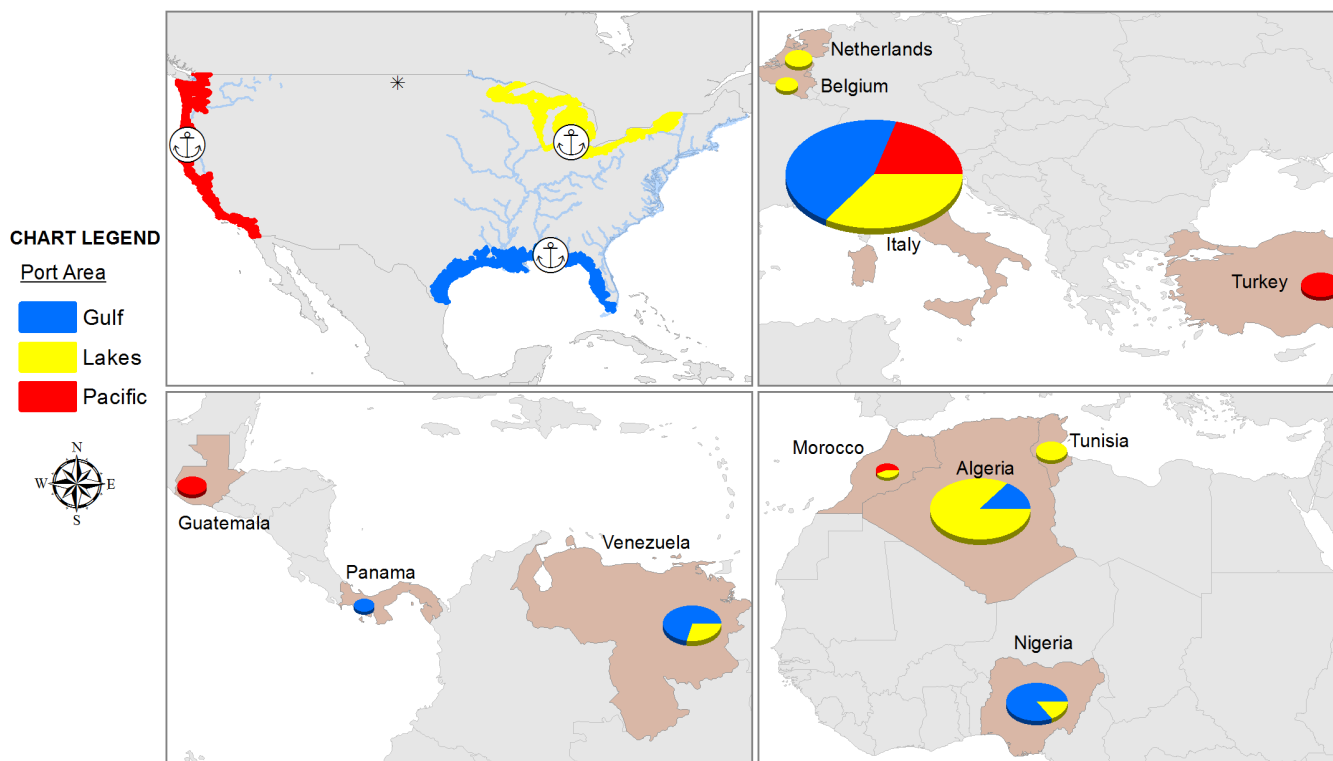
| CRD 5 - Central | | | | | | | | CRD 6 - East Central | | | | | | | |
|-------------------|--------|-------|---------|-----|-----|-------|-------|----------------------|--------|-------|---------|-----|-----|-------|-------|
| | Duluth | MN/WI | Midland | PNW | ND | Other | Total | | Duluth | MN/WI | Midland | PNW | ND | Other | Total |
| Previous 5 Yr Avg | 12% | 49% | 4% | 0% | 17% | 18% | 1,026 | Previous 5 Yr Avg | 6% | 38% | 0% | 0% | 28% | 8% | 74 |
| 2010-11 | 28% | 14% | 21% | 0% | 6% | 31% | 1,485 | 2010-11 | 0% | 0% | 0% | 0% | 0% | 0% | 0 |
| 2011-12 | 0% | 34% | 19% | 0% | 22% | 24% | 679 | 2011-12 | 0% | 100% | 0% | 0% | 0% | 0% | 60 |
| 2012-13 | 8% | 7% | 13% | 0% | 29% | 43% | 1,627 | 2012-13 | 0% | 100% | 0% | 0% | 0% | 0% | 2,254 |
| 2013-14 | 5% | 0% | 7% | 0% | 24% | 64% | 535 | 2013-14 | 0% | 0% | 0% | 0% | 0% | 0% | 0 |
| 2014-15 | 10% | 2% | 4% | 0% | 8% | 75% | 722 | 2014-15 | 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 | 25% | 50% | 12% | 2% | 3% | 9% | 5,897 | Previous 5 Yr Avg | 0% | 90% | 0% | 0% | 10% | 0% | 79 |
| 2010-11 | 20% | 49% | 7% | 2% | 4% | 17% | 8,730 | 2010-11 | 16% | 84% | 0% | 0% | 0% | 0% | 30 |
| 2011-12 | 16% | 36% | 6% | 1% | 3% | 39% | 4,409 | 2011-12 | 0% | 0% | 0% | 0% | 100% | 0% | 23 |
| 2012-13 | 14% | 42% | 11% | 2% | 4% | 27% | 5,079 | 2012-13 | 0% | 0% | 0% | 0% | 100% | 0% | 29 |
| 2013-14 | 9% | 40% | 18% | 0% | 3% | 29% | 6,794 | 2013-14 | 0% | 0% | 0% | 0% | 100% | 0% | 58 |
| 2014-15 | 10% | 65% | 4% | 0% | 7% | 13% | 4,093 | 2014-15 | 0% | 0% | 0% | 0% | 100% | 0% | 34 |

| CRD 9 - Southeast | | | | | | | |
|-------------------|--------|-------|---------|-----|------|-------|-------|
| | Duluth | MN/WI | Midland | PNW | ND | Other | Total |
| Previous 5 Yr Avg | 1% | 77% | 0% | 0% | 3% | 0% | 172 |
| 2010-11 | 0% | 79% | 0% | 0% | 21% | 0% | 9 |
| 2011-12 | 0% | 0% | 0% | 0% | 100% | 0% | 1 |
| 2012-13 | 0% | 97% | 0% | 0% | 0% | 3% | 505 |
| 2013-14 | 0% | 100% | 0% | 0% | 0% | 0% | 17 |
| 2014-15 | 0% | 0% | 0% | 0% | 0% | 0% | 0 |

**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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For more information contact:
info@ugpti.org • (701) 231-7767
 NDSU Dept 2880 • P.O. Box 6050
 Fargo, ND • 58108-6050