

# HARD RED SPRING WHEAT

**North Dakota** is a forerunner in the U.S. wheat industry, ranking second among states in total wheat production and first in production of hard red spring wheat. This report summarizes some logistical trends associated with the movement of hard red spring wheat from elevator to domestic and export markets. Figure 1 shows a sustained trend toward larger rail shipments in the wheat market. Shuttle facilities share during the 2013-15 time frame was 74%. Further, rail rates to the Pacific Northwest continue to favor shuttles over smaller shipments, as depicted in Figure 2 below.

**Markets** Hard red spring (HRS) wheat is the leading crop planted in North Dakota (N.D. Agricultural Experiment Station), making it a key commodity in North Dakota agriculture. North Dakota accounts for nearly one-half of total HRS wheat production in the United States. This wheat moves to domestic and export markets in both east- and west-bound shipments.

Portland (PNW) remained ahead of other destinations as a market for shipments of HRS wheat originating from North Dakota elevators in 2014-15 (Figure 3). Minneapolis and Midland shipments typically move beyond the gateway to U.S. domestic millers. The Pacific Northwest is a large U.S. grain port and important gateway to Asian markets. 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 1: Share of Business by Shipper Type

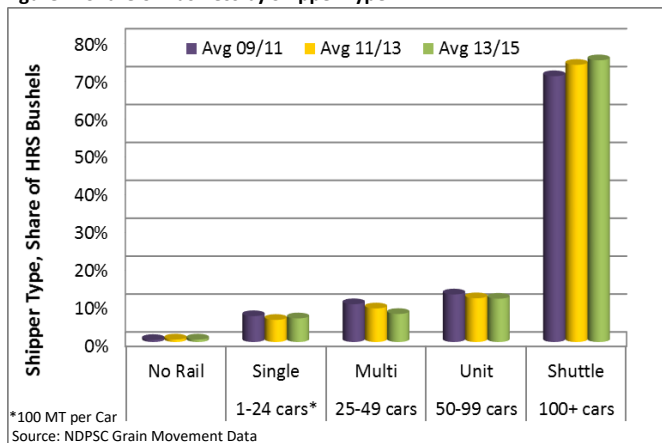


Figure 3: Destination for HRS Wheat Originating from ND Elevators

ND PSC Grain Movement Summary, July-June Market Year  
1,000 Bushels

	Duluth	Mpls	Other MN & WI	Midland & Gulf	PNW	ND	Other	Total
Previous 5 Yr Avg	7%	30%	4%	10%	20%	7%	21%	236,813
2010-11	7%	20%	5%	13%	21%	7%	27%	328,147
2011-12	5%	18%	4%	9%	23%	9%	31%	190,161
2012-13	4%	15%	4%	11%	24%	9%	35%	231,495
2013-14	4%	12%	4%	11%	28%	8%	33%	250,168
2014-15	5%	10%	5%	11%	25%	9%	35%	284,631

Figure 2: Rail Rates—Wheat, North Dakota to Pacific Northwest

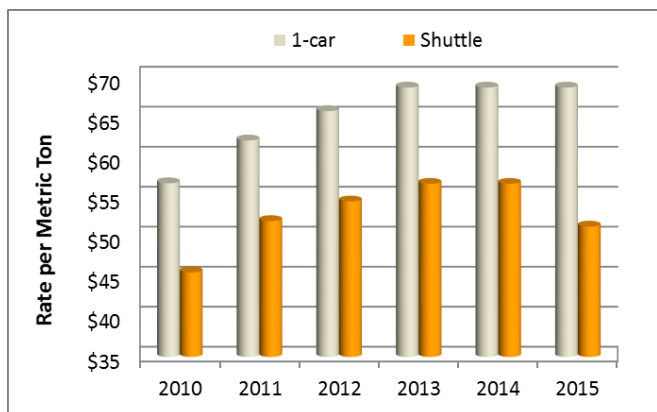
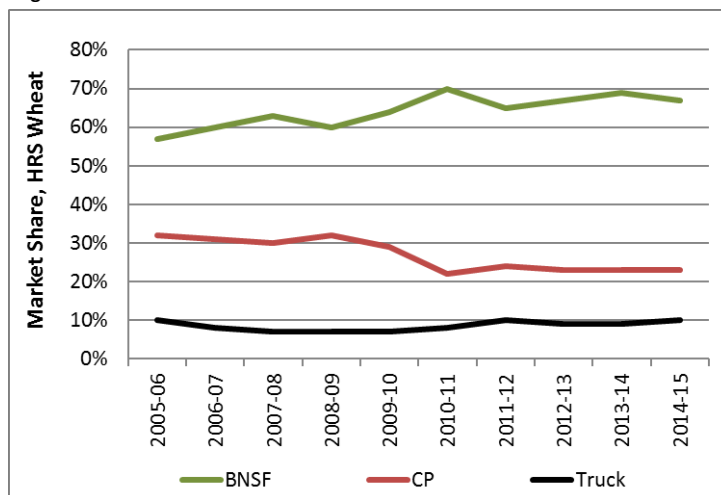


Figure 4: Rail Line Market Shares Over Time



**Rail Market Shares** Figure 4 shows the trends in market share for Burlington Northern Santa Fe (BNSF)\* and Canadian Pacific (CP)\*\* rail lines as well as trucks for HRS wheat shipped from North Dakota elevators. BNSF remains the largest hauler of North Dakota wheat - 67%. After maintaining several years of market share at or above 30%, CP remains low at 23% in 2014-15. The truck share is 10% for shipments from ND elevators during this market year.

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

**Destinations for Hard Red Spring Wheat Shipments from ND CRD's**

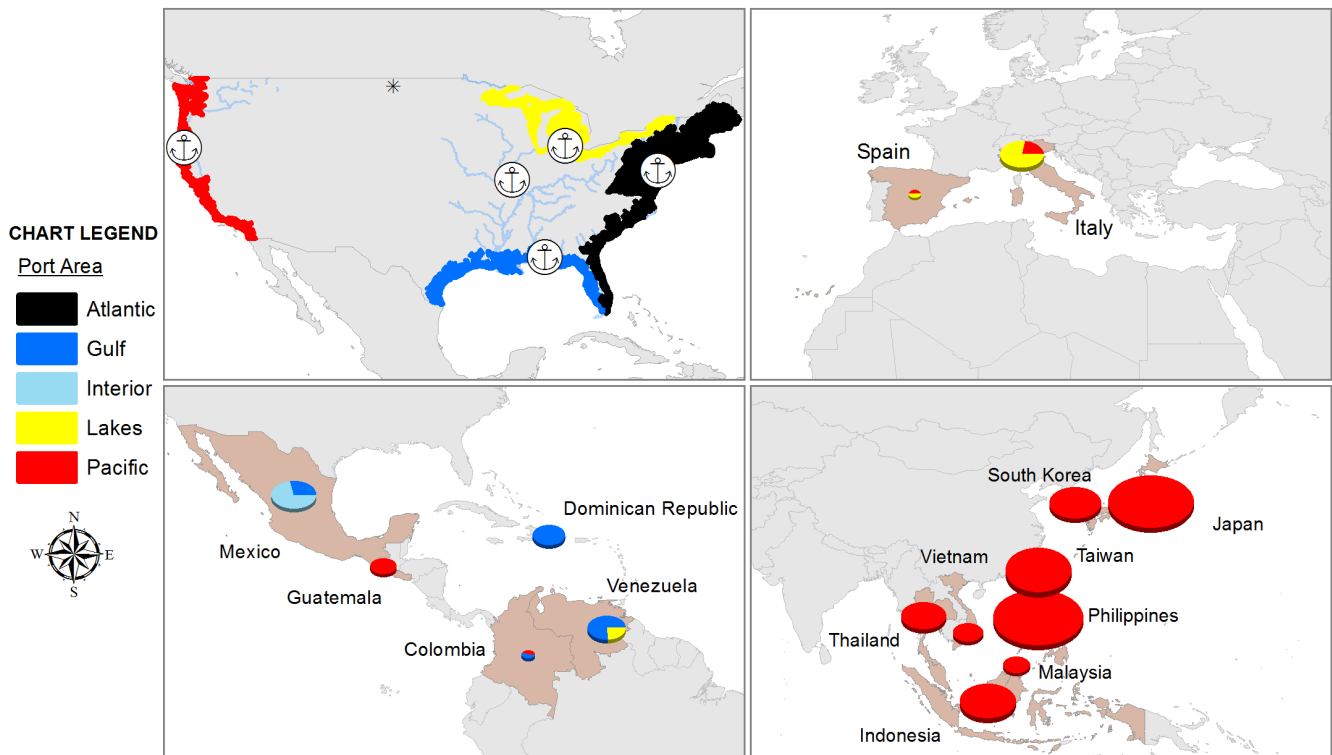
(1000 Bushels)

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	2%	25%	7%	52%	7%	7%	25,327	Previous 5 Yr Avg	9%	30%	11%	21%	3%	26%	24,407
2010-11	5%	16%	8%	46%	4%	20%	35,053	2010-11	1%	20%	17%	24%	3%	35%	27,521
2011-12	7%	12%	5%	58%	4%	15%	16,048	2011-12	3%	13%	5%	33%	5%	40%	12,402
2012-13	3%	11%	6%	62%	2%	16%	36,381	2012-13	2%	20%	1%	16%	4%	57%	19,431
2013-14	4%	9%	9%	65%	3%	10%	35,864	2013-14	2%	13%	7%	22%	4%	52%	18,289
2014-15	9%	11%	13%	51%	6%	10%	43,731	2014-15	3%	9%	7%	48%	6%	28%	22,765
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	8%	33%	7%	10%	13%	28%	67,294	Previous 5 Yr Avg	5%	30%	13%	8%	8%	36%	15,684
2010-11	14%	23%	11%	12%	12%	28%	102,337	2010-11	0%	22%	11%	16%	10%	42%	20,721
2011-12	8%	25%	7%	12%	14%	32%	72,528	2011-12	0%	16%	19%	12%	7%	46%	12,822
2012-13	4%	19%	14%	10%	19%	35%	63,935	2012-13	0%	8%	11%	34%	2%	45%	18,635
2013-14	4%	17%	11%	4%	17%	46%	65,839	2013-14	0%	5%	8%	33%	5%	49%	19,696
2014-15	4%	13%	8%	8%	16%	51%	85,138	2014-15	0%	8%	9%	31%	2%	49%	22,359
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%	47%	12%	4%	7%	18%	25,374	Previous 5 Yr Avg	11%	19%	15%	43%	5%	7%	24,786
2010-11	5%	29%	10%	9%	7%	40%	38,865	2010-11	4%	14%	30%	32%	9%	11%	35,101
2011-12	8%	13%	5%	17%	8%	49%	17,733	2011-12	4%	23%	14%	32%	9%	18%	17,579
2012-13	10%	25%	8%	9%	12%	36%	17,535	2012-13	5%	15%	12%	9%	14%	46%	18,984
2013-14	7%	20%	15%	6%	12%	41%	17,960	2013-14	5%	25%	18%	8%	15%	29%	16,962
2014-15	13%	12%	9%	13%	10%	43%	23,998	2014-15	10%	16%	24%	9%	16%	25%	19,996
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	12%	22%	14%	27%	1%	24%	26,439	Previous 5 Yr Avg	1%	85%	9%	1%	3%	2%	9,124
2010-11	10%	18%	9%	37%	1%	24%	36,102	2010-11	0%	81%	13%	0%	3%	3%	12,682
2011-12	1%	13%	13%	50%	1%	21%	22,351	2011-12	1%	55%	21%	2%	9%	13%	8,693
2012-13	4%	16%	15%	36%	0%	29%	37,521	2012-13	2%	41%	12%	10%	6%	29%	9,599
2013-14	2%	5%	11%	60%	1%	21%	43,677	2013-14	6%	31%	13%	25%	2%	23%	21,377
2014-15	5%	15%	11%	36%	1%	33%	33,579	2014-15	2%	33%	15%	27%	6%	17%	22,504
CRD 9 - Southeast															
	Duluth	MN/WI	Midland	PNW	ND	Other	Total								
Previous 5 Yr Avg	4%	55%	9%	8%	3%	21%	18,378								
2010-11	2%	48%	9%	7%	3%	31%	19,765								
2011-12	0%	45%	5%	4%	8%	38%	10,004								
2012-13	0%	40%	8%	0%	11%	41%	9,025								
2013-14	3%	50%	4%	0%	9%	33%	10,505								
2014-15	2%	48%	4%	7%	3%	36%	11,162								

\*\*One metric ton = 36.74 Bushels

Patterns and methods of shipping HRS Wheat 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/>.

**HRS Wheat Export by Region and Port Area**



North Dakota Wheat Commission (N.D.) Buyers and Processors. Retrieved May 26, 2010, from <http://www.ndwheat.com/buyers/>  
 North Dakota Hard Red Spring Wheat: Variety Trial Results for 2008 and Selection Guide, N.D. Agricultural Experiment Station. NDSU Extension Service.

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