

DURUM

AGRICULTURE SHIPMENT BRIEF

2019

N.D. Durum production is around 40 million bushels annually. Approximately 60% of land used in durum production in the United States is located in North Dakota, followed by Montana, Arizona, and California. (ND Wheat Commission).

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 facilities in the durum market. Shuttle facilities' share during the most recent 3-year time frame was 51% followed by multi (25%) and unit (19%) train facilities. Rail rates to Minneapolis have held steady for all train types from 2015 through 2018 (Figure 2).

Figure 1: Share of Business by Elevator Shipper Type

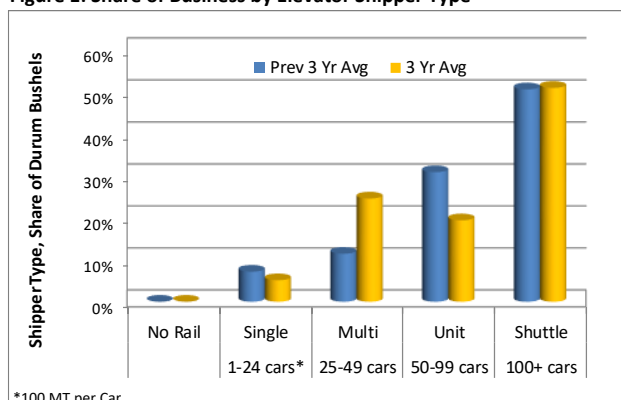
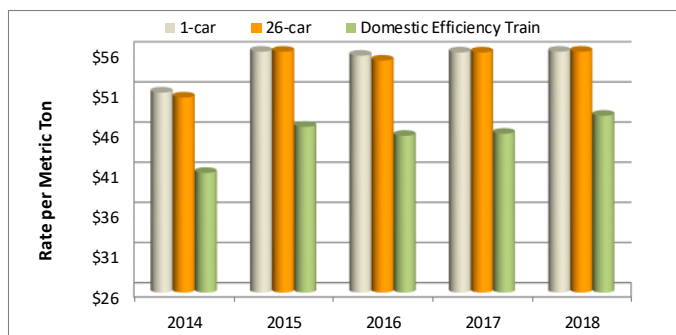


Figure 2: Rail Rates—Durum, North Dakota to Minneapolis



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 rail roads, as well as trucks, are shown in Figure 4. BNSF continues to hold the largest share, more than 50% since 2009-10. CP holds a 25% share in the 2017-18 crop year. The share held by trucks is currently 22%.

*Includes Red River Valley & Western (RRVW)

**Includes Dakota Missouri Valley & Western (DMVW), and Northern Plains Rail (NPR)

Markets Durum is used primarily for pasta products. In the United States, pasta consumption amounts to 20 lbs. per capita every year (North Dakota Wheat Commission). 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 WI/Other MN in 2017-18. The Duluth shipments are destined for export customers in Europe and North Africa. WI/Other MN and Midland shipments typically move beyond the gateway to U.S. domestic millers. Overall destination percentages remain fairly consistent for all ports.

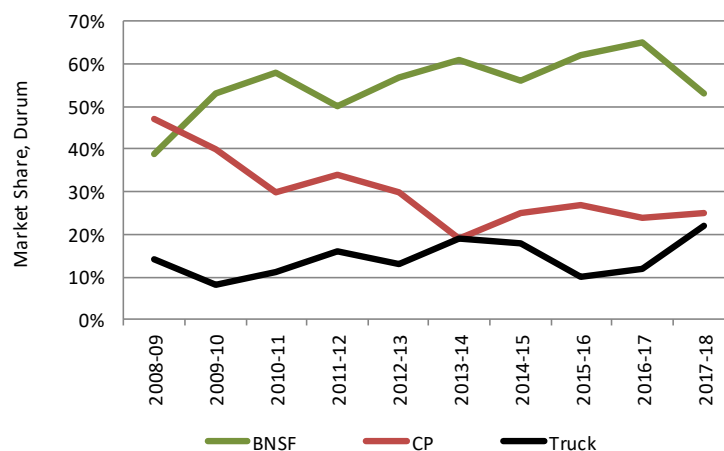
Crop reporting district (CRD) origin detail is provided on page 2, along with specifics on markets and export points.

Figure 3: Destination for Durum Originating from ND Elevators

ND PSC Grain Movement Summary, June-July Market Year							
1,000 Bushels							
	Duluth	WI/Other MN	Midland & Gulf	PNW	ND	Other	Total
Previous							
5 Yr Avg	22%	27%	19%	1%	19%	12%	36,028
2013-14	21%	25%	22%	5%	16%	11%	34,587
2014-15	25%	22%	21%	2%	16%	15%	25,216
2015-16	23%	22%	20%	5%	14%	16%	28,929
2016-17	32%	26%	15%	1%	14%	13%	30,564
2017-18	15%	26%	19%	6%	24%	11%	17,635

WI/Other MN includes Minneapolis, southeastern Minnesota and Chicago gateway
Midland & Gulf includes states west of the Mississippi River not in any other column: MO, AR, LA, KS, OK, TX, MT, WY, CO, NM, AZ, NV, CA
Other includes other states primarily east of Chicago, Canada, Mexico, and unknown

Figure 4: Market Share Over Time



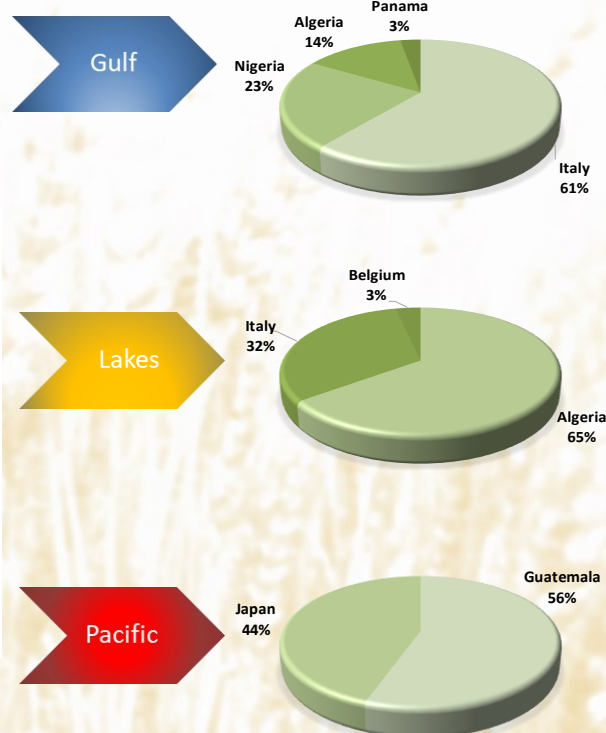
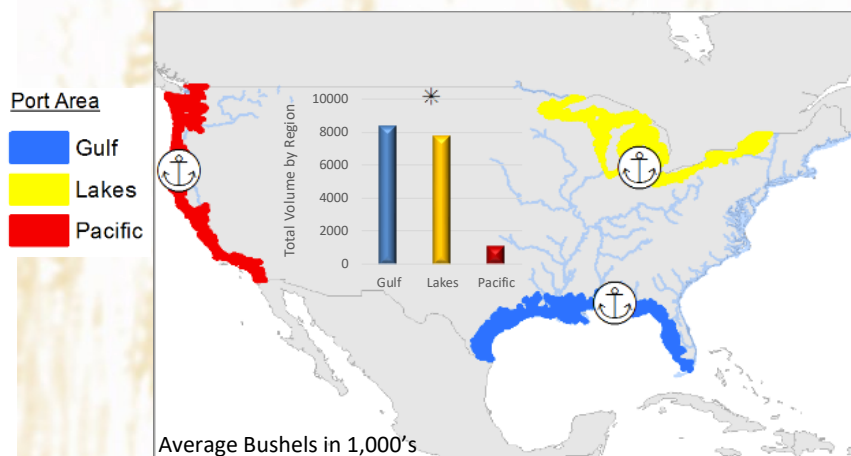
Destinations for Durum Shipments from ND CRD's
(1000 Bushels)**

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	28%	22%	20%	1%	20%	8%	24,188	Previous 5 Yr Avg	7%	25%	2%	0%	56%	10%	1,209
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	2015-16	0%	54%	1%	0%	30%	15%	341
2015-16	28%	15%	25%	8%	13%	10%	17,665	2015-16	15%	16%	6%	0%	62%	1%	506
2016-17	41%	22%	21%	0%	11%	5%	19,342	2016-17	21%	0%	3%	5%	51%	21%	1,649
2017-18	15%	29%	27%	8%	19%	2%	11,972	2017-18	30%	8%	11%	0%	47%	3%	823
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	4%	31%	14%	2%	21%	27%	594	Previous 5 Yr Avg	2%	28%	28%	0%	27%	15%	3,101
2013-14	41%	10%	6%	0%	31%	11%	378	2013-14	0%	10%	14%	0%	38%	39%	1,496
2015-16	30%	18%	1%	0%	36%	16%	552	2015-16	3%	11%	9%	0%	10%	68%	1,109
2015-16	16%	20%	4%	0%	40%	19%	950	2015-16	0%	7%	26%	0%	15%	52%	974
2016-17	16%	16%	1%	2%	34%	32%	924	2016-17	0%	42%	6%	0%	9%	43%	1,360
2017-18	3%	3%	0%	0%	92%	3%	694	2017-18	0%	16%	1%	0%	32%	51%	729
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	11%	25%	12%	0%	18%	33%	983	Previous 5 Yr Avg	0%	40%	0%	0%	17%	3%	474
2013-14	5%	0%	7%	0%	24%	64%	535	2013-14	0%	0%	0%	0%	0%	0%	0
2015-16	10%	2%	4%	0%	8%	75%	722	2015-16	0%	0%	0%	0%	0%	0%	0
2015-16	1%	4%	1%	0%	28%	65%	1,070	2015-16	0%	100%	0%	0%	0%	0%	4
2016-17	1%	10%	0%	0%	26%	63%	1,883	2016-17	0%	100%	0%	0%	0%	0%	64
2017-18	0%	0%	0%	0%	32%	68%	1,431	2017-18	6%	91%	0%	0%	4%	0%	69
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	15%	44%	13%	2%	3%	23%	5,313	Previous 5 Yr Avg	3%	48%	0%	0%	49%	0%	38
2013-14	9%	40%	18%	0%	3%	29%	6,794	2013-14	0%	0%	0%	0%	100%	0%	58
2015-16	10%	65%	4%	0%	7%	13%	4,093	2015-16	0%	0%	0%	0%	100%	0%	34
2015-16	18%	48%	9%	0%	8%	17%	5,695	2015-16	0%	0%	0%	0%	100%	0%	11
2016-17	29%	46%	8%	2%	4%	11%	5,110	2016-17	0%	33%	0%	0%	67%	0%	53
2017-18	32%	40%	0%	2%	9%	17%	1,519	2017-18	0%	0%	0%	0%	0%	0%	0
CRD 9 - Southeast															
	Duluth	MN/WI	Midland	PNW	ND	Other	Total								
Previous 5 Yr Avg	0%	54%	0%	0%	26%	1%	128								
2013-14	0%	100%	0%	0%	0%	0%	17								
2015-16	0%	0%	0%	0%	0%	0%	0								
2015-16	0%	10%	0%	0%	0%	90%	54								
2016-17	16%	84%	0%	0%	0%	0%	180								
2017-18	0%	92%	0%	1%	6%	0%	398								

**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 RECENT 3-YEAR AVERAGE



Source: U.S. Department of Agriculture

NDSU Plant Sciences, *Durum Wheat Production*. Accessed online Oct. 18, 2017, at <https://www.ag.ndsu.edu/plantsciences/research/durum/production>

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