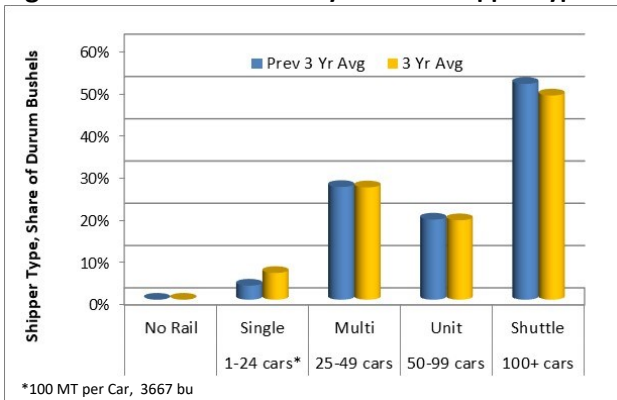


N.D. Durum production is around 37 million bushels (1MMT) annually. Approximately 60% of land used in durum production in the United States is located in North Dakota, followed by Montana, Arizona, and California (ND Wheat Commission).

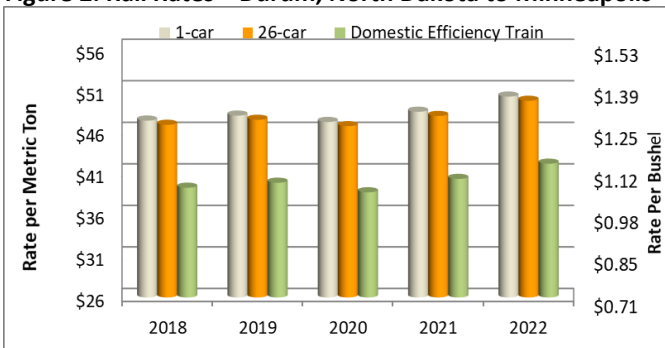
Logistical data presented in this report reviews trends associated with the movement of durum from North Dakota elevators to markets. Figure 1 shows a continued trend toward larger rail facilities in the durum market. Shuttle facilities' share during the most recent 3-year time frame was 48% followed by multi (27%) and unit (19%) train facilities. Rail rates held steady for all train types for the recent 5-year time period, although a slight increase in rates for DETs is shown in 2022.

Figure 1: Share of Business by Elevator Shipper Type



Source: ND Department of Agriculture Grain Movement Data

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% in the last 10-years. Eighteen percent of durum shipments went by CP in the 2021-22 crop year. Durum shipped via truck has shown some fluctuation, but is currently at a high of 26%.

*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, 34%, to ND processors in 2021-22. This was followed by WI/Other MN at 25% and Midland/Gulf at 20%. WI/Other MN and Midland shipments typically move beyond the gateway to U.S. domestic millers.

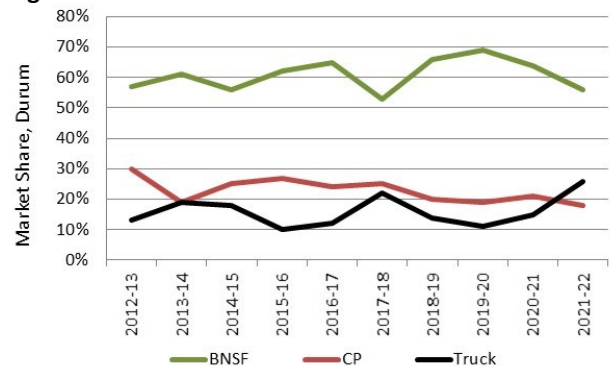
Crop reporting district (CRD) origin detail is provided on page 2, along with specifics on markets and export points.

Figure 3: Destination for Durum Originating from ND Elevators

	Duluth	WI/Other MN	Midland & Gulf	PNW	ND	Other	Total
Previous							
5 Yr Avg	23%	25%	19%	3%	16%	14%	31,558
2017-18	15%	26%	19%	6%	24%	11%	17,635
2018-19	30%	26%	8%	4%	19%	13%	25,060
2019-20	46%	21%	6%	1%	18%	12%	31,744
2020-21	22%	27%	15%	1%	18%	18%	22,953
2021-22	8%	25%	20%	0%	34%	13%	18,617

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: Rail Line Market Shares Over Time



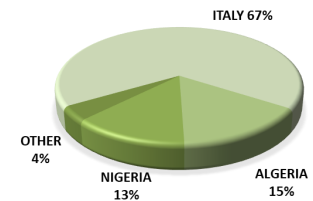
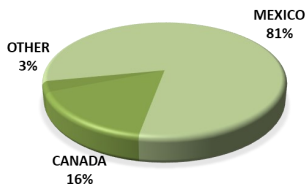
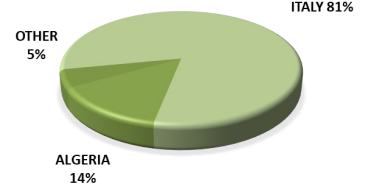
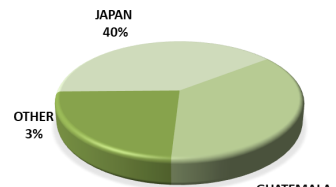
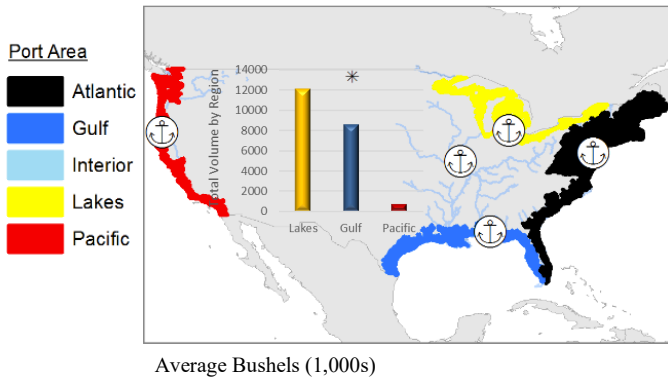
Destinations for Durum Shipments from ND CRD's
(1000 Bushels)**

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	25%	19%	24%	4%	20%	8%	20,001	Previous 5 Yr Avg	7%	28%	1%	0%	52%	11%	704
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
2018-19	38%	21%	10%	5%	18%	8%	18,117	2018-19	7%	17%	9%	0%	66%	1%	427
2019-20	64%	11%	4%	1%	17%	4%	20,354	2019-20	0%	32%	8%	4%	47%	10%	592
2020-21	30%	31%	1%	0%	15%	9%	15,102	2020-21	0%	21%	0%	0%	79%	0%	378
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%	21%	3%	1%	33%	22%	644	Previous 5 Yr Avg	2%	7%	25%	0%	24%	43%	1,795
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
2018-19	0%	29%	10%	0%	43%	18%	1,079	2018-19	16%	28%	3%	0%	21%	32%	898
2019-20	14%	5%	5%	2%	73%	0%	814	2019-20	0%	20%	7%	0%	14%	60%	1,625
2020-21	0%	0%	0%	0%	99%	0%	544	2020-21	0%	29%	0%	0%	0%	71%	701
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	5%	9%	0%	0%	22%	54%	927	Previous 5 Yr Avg	0%	60%	0%	0%	0%	0%	464
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
2018-19	2%	0%	0%	0%	39%	59%	1,004	2018-19	0%	98%	0%	0%	2%	0%	358
2019-20	0%	46%	0%	3%	25%	26%	943	2019-20	0%	100%	0%	0%	0%	0%	243
2020-21	0%	24%	0%	0%	61%	14%	1,339	2020-21	0%	10%	0%	0%	90%	0%	27
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	13%	46%	10%	1%	5%	25%	5,214	Previous 5 Yr Avg	0%	0%	0%	0%	100%	0%	31
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
2018-19	13%	50%	5%	2%	3%	26%	3,177	2018-19	0%	0%	0%	0%	0%	0%	0
2019-20	20%	42%	15%	0%	1%	23%	7,154	2019-20	0%	0%	0%	0%	0%	0%	0
2020-21	13%	17%	26%	2%	2%	42%	4,862	2020-21	0%	0%	0%	0%	0%	0%	0
CRD 9 - Southeast															
	Duluth	MN/WI	Midland	PNW	ND	Other	Total								
Previous 5 Yr Avg	0%	41%	0%	0%	20%	19%	115								
2016-17	16%	84%	0%	0%	0%	0%	180								
2017-18	0%	92%	0%	1%	6%	0%	398								
2018-19	0%	0%	0%	0%	0%	0%	0								
2019-20	0%	92%	0%	0%	8%	0%	19								
2020-21	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
RECENT 3-YEAR AVERAGE



Source: U.S. Department of Agriculture

North Dakota Wheat Commission (N.D.) Buyers and Processors. Retrieved from <http://www.ndwheat.com/buyers/>

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

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