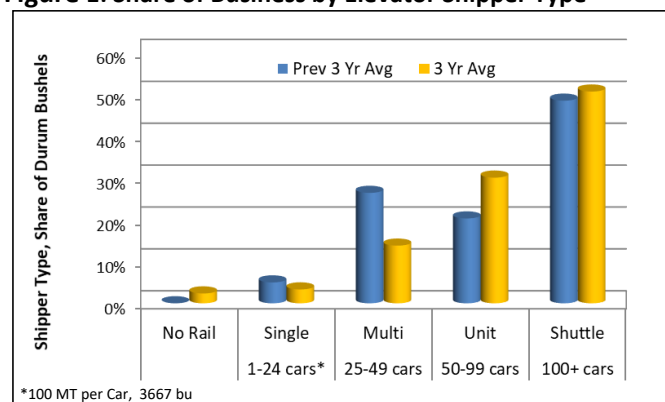


N.D. Durum production is around 37 million bushels (1MMT) annually. Approximately 60% of land used in durum production in the United States is located in North Dakota, followed by Montana, Arizona, and California (ND Wheat Commission).

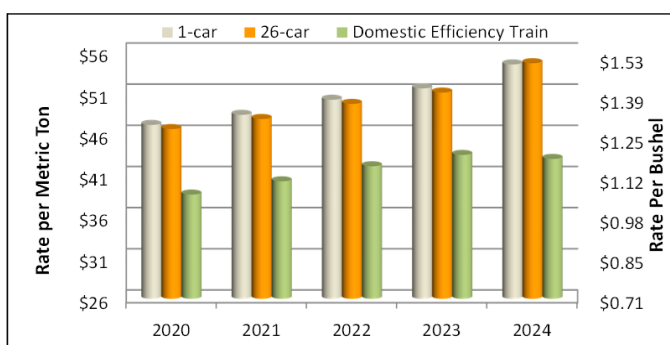
Logistical data presented in this report reviews trends associated with the movement of durum from North Dakota elevators to markets. Figure 1 shows a continued trend toward larger rail facilities in the durum market. Shuttle facilities' share during the most recent 3-year time frame was 51% followed by unit (30%) and multi (14%) train facilities. Rail rates increased slightly for 1-car and 26-car trains during the recent 5-year time period while remaining steady for DETs in recent years.

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 Chicago



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. Fifteen percent of durum shipments went by CP in the 2023-24 crop year. Durum shipped via truck has shown some fluctuation, but is currently at 17%.

*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, 23%, to Other Markets in 2023-24. This was followed closely by ND at 20%. WI/Other MN also accounted for 20% while Midland & Gulf accounted for 16% of shipments. 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

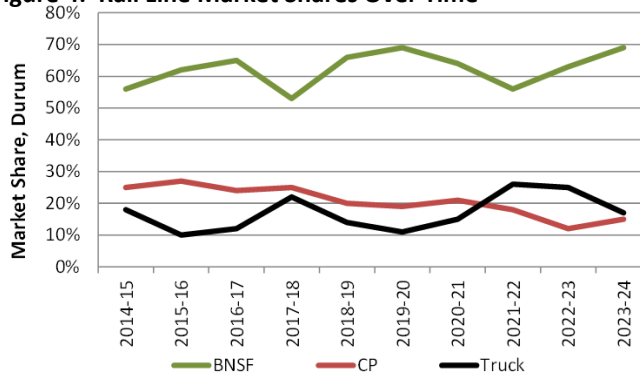
Grain Movement Summary, June-July Market Year
1,000 Bushels

	Duluth	WI/Other MN	Midland & Gulf	PNW	ND	Other	Total
Previous							
5 Yr Avg	25%	24%	17%	4%	17%	14%	25,481
2019-20	46%	21%	6%	1%	18%	12%	31,744
2020-21	22%	27%	15%	1%	18%	18%	22,953
2021-22	7%	23%	19%	0%	29%	23%	22,375
2022-23	6%	18%	18%	0%	35%	23%	21,107
2023-24	18%	20%	16%	3%	20%	23%	25,682

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

Figure 4: Rail Line Market Shares Over Time



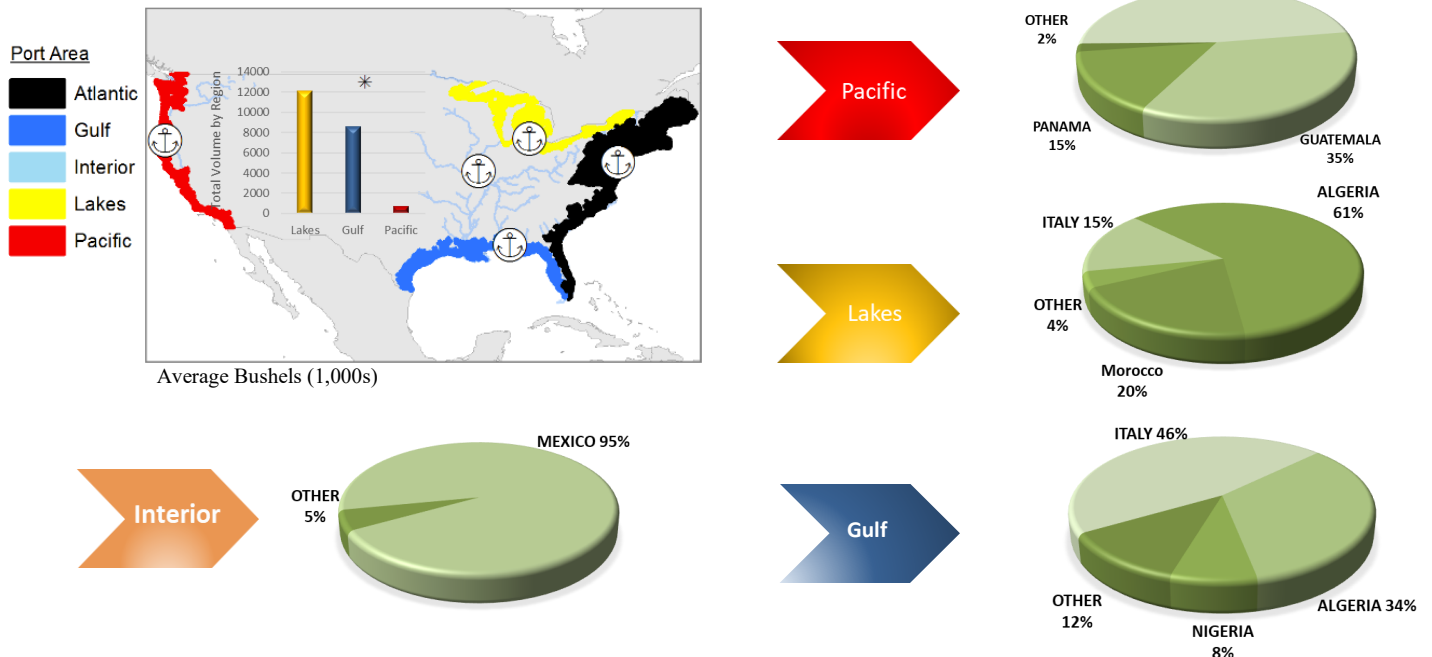
Destinations for Durum Shipments from ND CRD's (1000 Bushels)**

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	30%	20%	22%	5%	16%	7%	17,092	Previous 5 Yr Avg	15%	19%	6%	1%	51%	8%	749
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
2021-22	7%	20%	21%	0%	30%	23%	16,433	2021-22	13%	2%	0%	0%	81%	3%	286
2022-23	8%	17%	24%	0%	35%	16%	14,845	2022-23	0%	0%	0%	0%	100%	0%	140
2023-24	26%	23%	23%	0%	16%	12%	16,705	2023-24	0%	0%	0%	80%	20%	0%	1,027
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	13%	17%	3%	0%	49%	18%	840	Previous 5 Yr Avg	4%	21%	9%	0%	17%	49%	1,014
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
2021-22	18%	21%	0%	0%	39%	22%	1,738	2021-22	0%	93%	1%	0%	7%	0%	472
2022-23	10%	10%	0%	0%	78%	1%	859	2022-23	0%	100%	0%	0%	0%	0%	93
2023-24	0%	11%	0%	0%	89%	0%	888	2023-24	0%	82%	0%	3%	14%	0%	114
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	3%	3%	1%	0%	27%	66%	1,222	Previous 5 Yr Avg	1%	78%	0%	0%	1%	0%	99
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
2021-22	0%	10%	0%	0%	80%	10%	686	2021-22	0%	0%	0%	0%	0%	0%	0
2022-23	0%	5%	0%	0%	87%	8%	821	2022-23	0%	0%	0%	0%	0%	0%	0
2023-24	0%	11%	0%	0%	71%	18%	1,201	2023-24	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	20%	50%	5%	1%	6%	17%	3,919	Previous 5 Yr Avg	0%	7%	0%	0%	53%	0%	20
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
2021-22	0%	33%	29%	0%	4%	34%	2,759	2021-22	0%	0%	0%	0%	0%	0%	0
2022-23	2%	17%	7%	0%	17%	58%	3,949	2022-23	0%	0%	0%	0%	0%	0%	0
2023-24	6%	18%	6%	0%	9%	61%	5,744	2023-24	0%	0%	0%	100%	0%	0%	3
CRD 9 - Southeast															
	Duluth	MN/WI	Midland	PNW	ND	Other	Total								
Previous 5 Yr Avg	3%	37%	0%	0%	1%	18%	126								
2019-20	0%	92%	0%	0%	8%	0%	19								
2020-21	0%	0%	0%	0%	0%	0%	0								
2021-22	0%	0%	0%	0%	0%	0%	0								
2022-23	0%	100%	0%	0%	0%	0%	400								
2023-24	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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