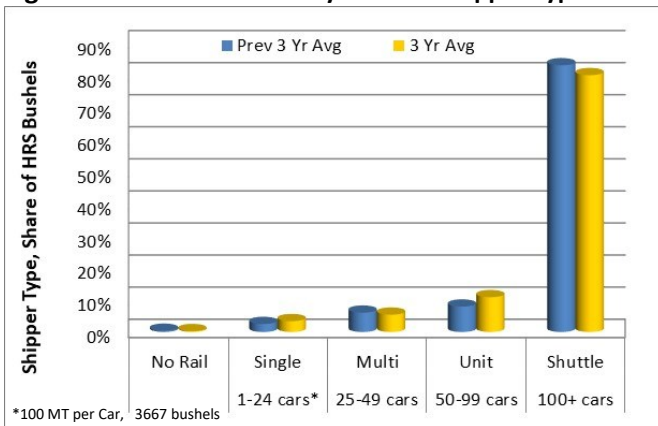


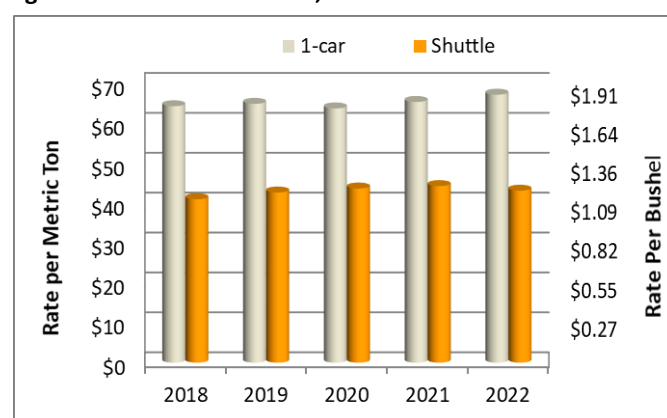
North Dakota is a leader in the U.S. wheat industry, ranking second among states in total wheat production and first in production of hard red spring wheat. This report summarizes some logistical trends associated with the movement of hard red spring wheat from elevator to domestic and export markets. Figure 1 shows a dominance of larger elevators, in terms of car track capacity, for marketing HRS wheat. Shuttle facilities' share during the most recent 3-year time frame was 80%. Further, rail rates to the Pacific Northwest continue to favor shuttles over smaller shipments, as shown in Figure 2 below.

Figure 1: Share of Business by Elevator Shipper Type



Source: ND Department of Agriculture Grain Movement Data

Figure 2: Rail Rates—Wheat, North Dakota to



Rail Market Shares

Figure 4 shows the trends in market share for HRS wheat shipped from North Dakota elevators via Burlington Northern Santa Fe Railway (BNSF)*, Canadian Pacific Railway (CP)**, and trucks. BNSF remains the largest hauler of North Dakota wheat - 65%. CP's share of shipments from ND elevators is consistent with previous years at 26%. The truck share is 10% during the 2021-22 market year.

*Includes Red River Valley & Western (RRVW)

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

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

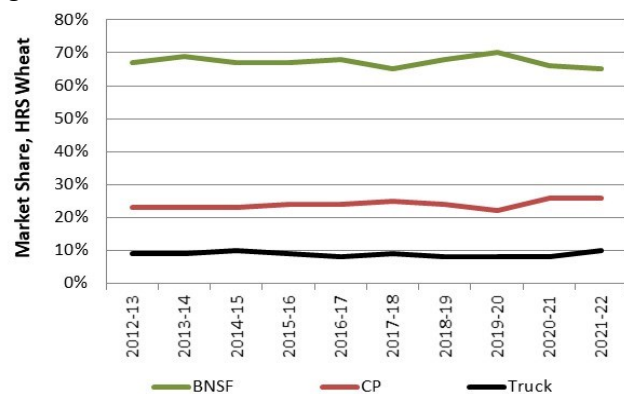
Portland (PNW) is a major destination market for shipments of HRS wheat originating from North Dakota elevators in 2021-22 (Figure 3). The Pacific Northwest is a large U.S. grain port and important gateway to Asian markets. WI/Other MN and Midland shipments typically move beyond the gateway to U.S. domestic millers. Crop reporting district (CRD) origin detail for these markets is provided on page 2, along with specifics on markets and export points.

Figure 3: Destination for HRS Wheat Originating from ND Elevators

	Duluth	WI/Other MN	Midland & Gulf	PNW	ND	Other	Total
Previous 5 Yr Avg	4%	16%	10%	29%	8%	32%	271,184
2017-18	2%	20%	9%	32%	8%	29%	225,647
2018-19	4%	18%	11%	35%	6%	26%	258,885
2019-20	4%	21%	12%	34%	7%	23%	268,063
2020-21	2%	21%	10%	33%	7%	27%	237,336
2021-22	3%	19%	12%	27%	10%	27%	182,280

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 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	5%	10%	9%	60%	4%	12%	35,276	Previous 5 Yr Avg	2%	12%	6%	37%	5%	39%	18,574
2016-17	1%	8%	8%	75%	2%	5%	38,505	2016-17	2%	9%	9%	56%	1%	23%	27,502
2017-18	2%	15%	7%	72%	2%	2%	26,874	2017-18	2%	25%	5%	51%	1%	15%	24,789
2018-19	3%	16%	5%	66%	1%	8%	34,436	2018-19	0%	19%	9%	48%	0%	24%	34,368
2019-20	5%	13%	7%	64%	5%	6%	32,297	2019-20	1%	22%	8%	53%	3%	12%	35,312
2020-21	3%	25%	7%	54%	1%	10%	41,741	2020-21	1%	16%	8%	60%	4%	11%	38,746

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	5%	18%	9%	8%	16%	43%	72,858	Previous 5 Yr Avg	1%	9%	11%	28%	4%	48%	18,552
2016-17	5%	14%	7%	17%	14%	45%	90,353	2016-17	7%	38%	3%	37%	1%	13%	20,218
2017-18	1%	15%	7%	19%	15%	43%	80,248	2017-18	1%	30%	16%	23%	1%	29%	13,492
2018-19	4%	14%	14%	12%	14%	42%	82,323	2018-19	1%	27%	8%	45%	1%	18%	15,016
2019-20	2%	17%	10%	11%	14%	46%	80,599	2019-20	1%	30%	11%	43%	0%	15%	18,253
2020-21	1%	13%	6%	10%	16%	54%	74,874	2020-21	0%	55%	3%	24%	0%	18%	9,668

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	9%	15%	9%	16%	10%	41%	20,313	Previous 5 Yr Avg	6%	20%	20%	12%	13%	29%	19,068
2016-17	10%	7%	4%	46%	6%	27%	29,574	2016-17	8%	41%	11%	11%	9%	20%	27,244
2017-18	3%	9%	8%	35%	6%	38%	22,055	2017-18	4%	31%	12%	20%	10%	23%	22,321
2018-19	11%	16%	4%	34%	11%	25%	20,728	2018-19	7%	38%	11%	24%	9%	11%	19,969
2019-20	5%	29%	6%	28%	9%	22%	24,094	2019-20	11%	33%	13%	21%	6%	16%	20,028
2020-21	2%	31%	6%	27%	9%	25%	22,096	2020-21	3%	12%	37%	16%	12%	20%	14,282

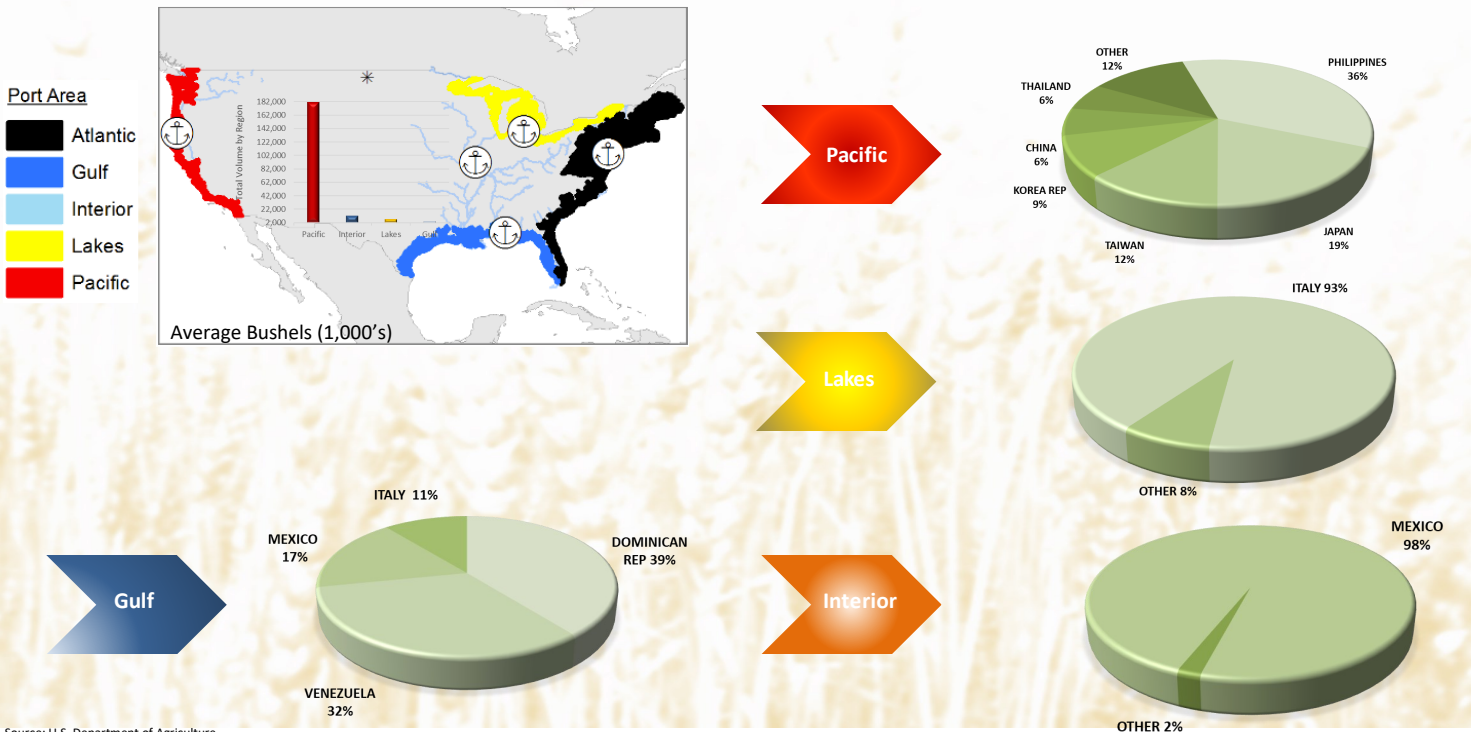
CRD 7 - Southwest								CRD 8 - South Central							
	Duluth	MN/WI	Midland	PNW	ND	Other	Total		Duluth	MN/WI	Midland	PNW	ND	Other	Total
Previous 5 Yr Avg	3%	11%	12%	46%	1%	27%	35,647	Previous 5 Yr Avg	2%	38%	15%	20%	5%	21%	16,951
2016-17	2%	10%	15%	54%	0%	17%	36,591	2016-17	3%	36%	12%	30%	1%	17%	19,831
2017-18	5%	13%	16%	49%	1%	16%	17,011	2017-18	8%	37%	20%	12%	5%	18%	9,267
2018-19	1%	4%	22%	56%	0%	17%	30,629	2018-19	4%	13%	13%	43%	0%	27%	12,854
2019-20	6%	5%	24%	52%	0%	12%	30,509	2019-20	8%	16%	23%	46%	0%	7%	17,238
2020-21	4%	4%	27%	49%	0%	15%	20,893	2020-21	3%	29%	13%	47%	0%	8%	8,011

CRD 9 - Southeast							
	Duluth	MN/WI	Midland	PNW	ND	Other	Total
Previous 5 Yr Avg	1%	47%	5%	2%	9%	36%	10,896
2016-17	0%	47%	2%	1%	14%	37%	16,143
2017-18	0%	50%	2%	0%	9%	38%	9,591
2018-19	9%	47%	3%	0%	1%	39%	8,562
2019-20	1%	60%	1%	3%	6%	29%	9,732
2020-21	0%	74%	0%	1%	0%	24%	7,027

**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
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.

NDSU does not discriminate in its programs and activities on the basis of age, color, gender expression/identity, genetic information, marital status, national origin, participation in lawful off-campus activity, physical or mental disability, pregnancy, public assistance status, race, religion, sex, sexual orientation, spousal relationship to current employee, or veteran status, as applicable. Direct inquiries to Vice Provost for Title IX/ADA Coordinator, Old Main 201, NDSU Main Campus, 701-231-7708, ndsu.eoaa@ndsu.edu.

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