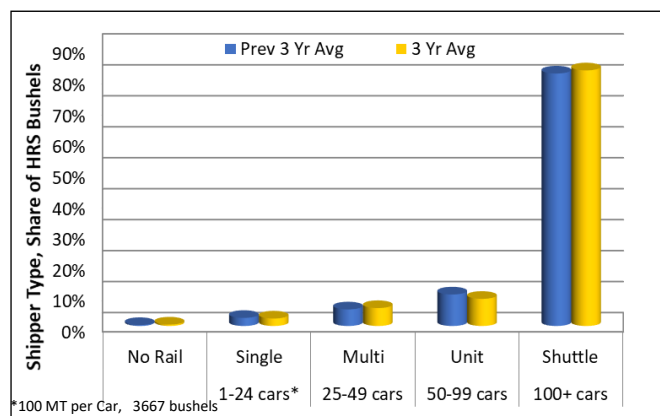


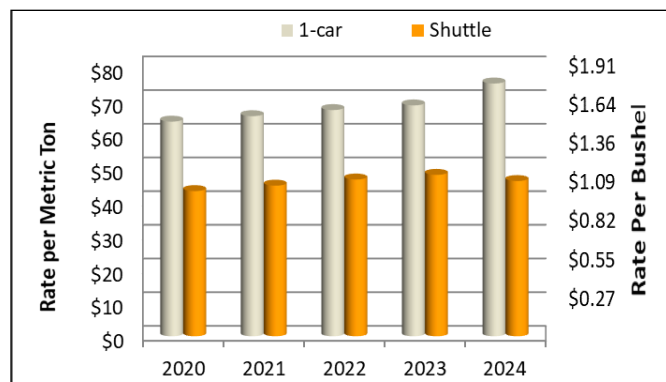
**North Dakota** is a leader in the U.S. wheat industry, ranking second among states in total wheat production and first in production of hard red spring wheat. This report summarizes some logistical trends associated with the movement of hard red spring wheat from elevator to domestic and export markets. 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 Pacific Northwest**



## 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 - 67%. CP's share of shipments from ND elevators decreased slightly compared to previous years at 24%. The truck share is 8% during the 2023-24 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 the state's agricultural sector. 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 2023-24 (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**

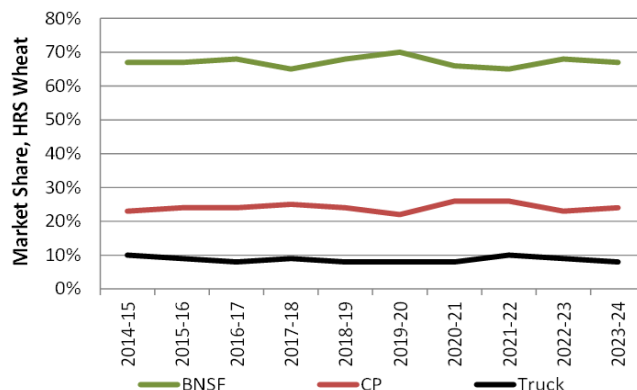
Grain Movement Summary, July-June Market Year 1,000 Bushels							
	Duluth	WI/Other MN	Midland & Gulf	PNW	ND	Other	Total
Previous							
5 Yr Avg	4%	17%	10%	32%	8%	30%	271,758
2019-20	4%	21%	12%	34%	7%	23%	268,063
2020-21	2%	21%	10%	33%	7%	27%	237,336
2021-22	3%	22%	11%	30%	9%	25%	220,755
2022-23	2%	19%	12%	31%	8%	30%	237,797
2023-24	1%	20%	12%	32%	8%	26%	250,880

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	4%	11%	9%	66%	3%	7%	37,581	Previous 5 Yr Avg	1%	13%	8%	54%	3%	21%	25,881
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
2021-22	0%	23%	5%	40%	4%	28%	33,355	2021-22	3%	6%	19%	40%	4%	27%	25,556
2022-23	1%	15%	5%	47%	2%	30%	30,178	2022-23	2%	7%	8%	50%	4%	30%	27,535
2023-24	4%	23%	5%	38%	2%	29%	31,053	2023-24	0%	10%	12%	60%	1%	17%	27,339

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%	14%	9%	13%	15%	47%	82,983	Previous 5 Yr Avg	3%	22%	8%	33%	2%	32%	18,066
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
2021-22	4%	27%	4%	8%	19%	38%	67,670	2021-22	4%	21%	5%	36%	0%	35%	10,765
2022-23	3%	26%	7%	7%	17%	41%	75,502	2022-23	0%	19%	14%	58%	0%	10%	18,883
2023-24	1%	24%	8%	12%	15%	41%	79,135	2023-24	0%	13%	16%	58%	0%	14%	18,866

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	8%	10%	7%	32%	8%	34%	24,139	Previous 5 Yr Avg	7%	30%	18%	13%	11%	21%	22,270
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
2021-22	4%	29%	10%	35%	11%	12%	16,240	2021-22	7%	27%	28%	16%	10%	13%	17,416
2022-23	1%	32%	7%	16%	6%	38%	17,610	2022-23	0%	20%	23%	11%	16%	30%	16,773
2023-24	3%	36%	10%	21%	10%	20%	18,936	2023-24	2%	27%	28%	6%	20%	17%	21,387

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%	10%	15%	48%	1%	23%	31,784	Previous 5 Yr Avg	3%	30%	15%	29%	2%	20%	17,408
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
2021-22	0%	3%	25%	66%	0%	7%	26,879	2021-22	0%	23%	16%	52%	0%	10%	12,993
2022-23	0%	1%	30%	53%	0%	16%	30,678	2022-23	3%	16%	16%	51%	1%	13%	14,713
2023-24	1%	2%	12%	67%	1%	18%	21,013	2023-24	3%	15%	25%	43%	0%	14%	13,244

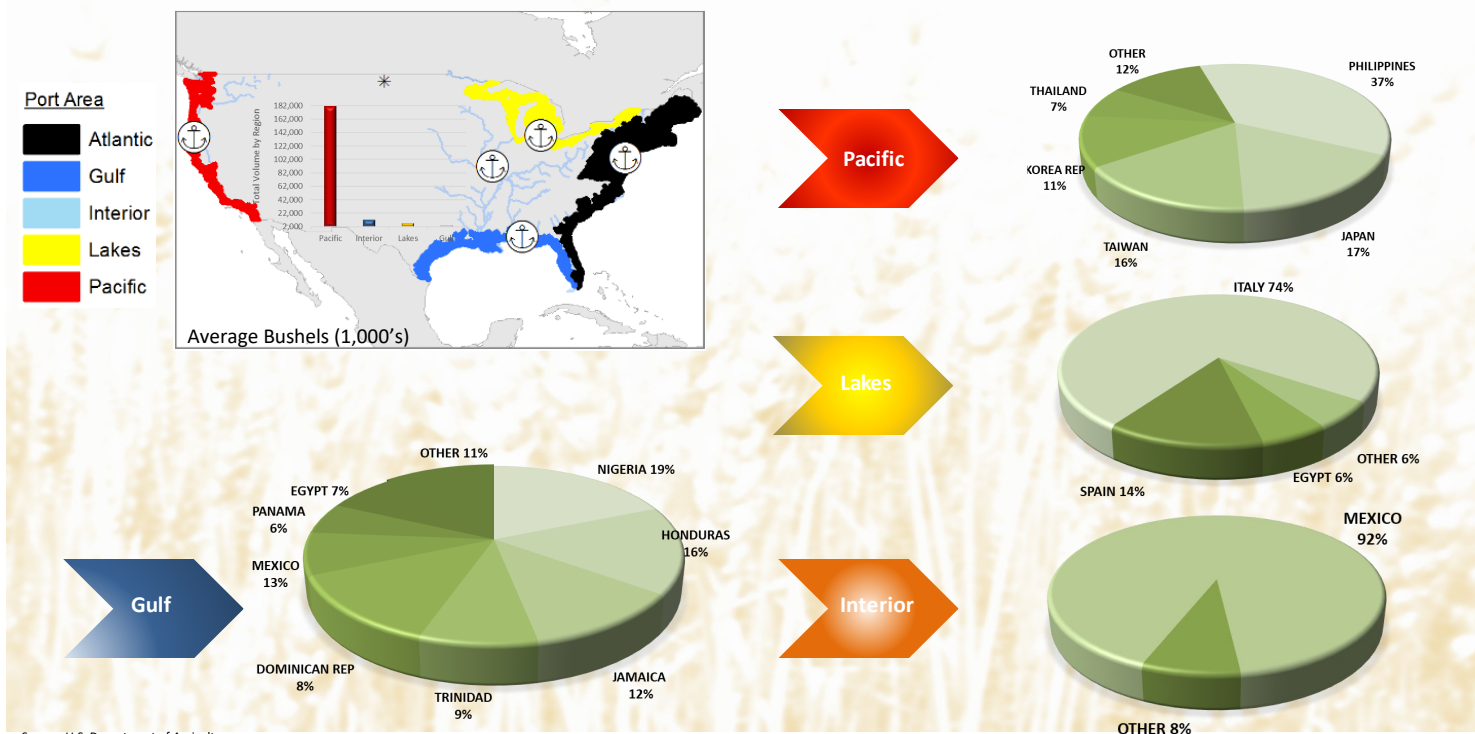
  

CRD 9 - Southeast															
	Duluth	MN/WI	Midland	PNW	ND	Other	Total								
Previous 5 Yr Avg	2%	48%	3%	2%	8%	37%	11,848								
2019-20	1%	60%	1%	3%	6%	29%	9,732								
2020-21	0%	74%	0%	1%	0%	24%	7,027								
2021-22	0%	54%	5%	1%	3%	37%	9,881								
2022-23	6%	57%	1%	6%	6%	23%	5,926								
2023-24	0%	60%	4%	9%	8%	19%	9,907								

\*\*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/>

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