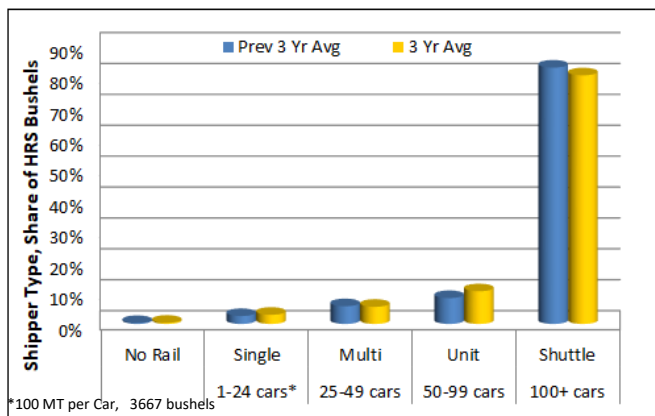


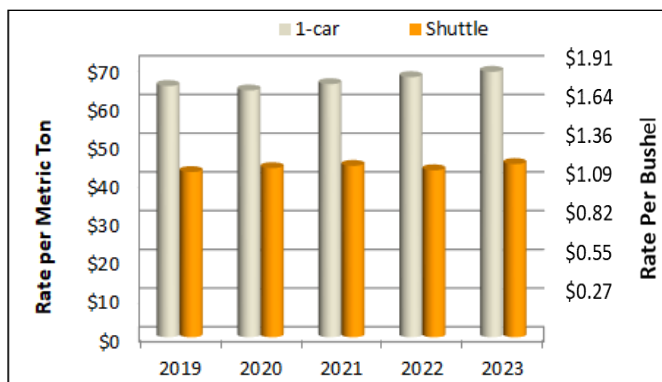
North Dakota is a leader in the U.S. wheat industry, ranking second among states in total wheat production and first in production of hard red spring wheat. This report summarizes some logistical trends associated with the movement of hard red spring wheat from elevator to domestic and export markets. 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 - 68%. CP's share of shipments from ND elevators decreased slightly compared to previous years at 23%. The truck share is 9% during the 2022-23 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.

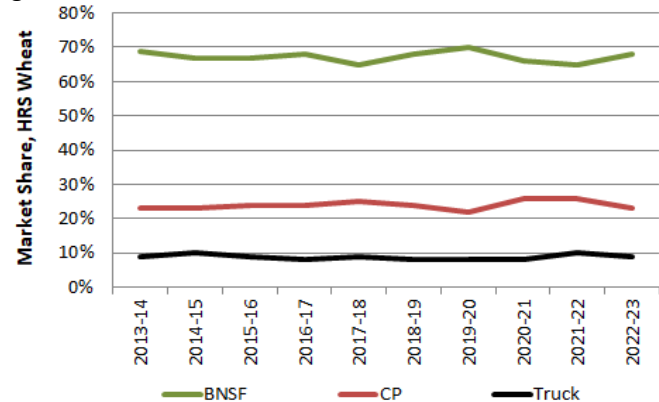
Portland (PNW) is a major destination market for shipments of HRS wheat originating from North Dakota elevators in 2022-23 (Figure 3). The Pacific Northwest is a large U.S. grain port and important gateway to Asian markets. WI/Other MN and Midland shipments typically move beyond the gateway to U.S. domestic 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%	17%	10%	31%	8%	31%	270,015
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%	22%	11%	30%	9%	25%	220,755
2022-23	2%	19%	12%	31%	8%	30%	237,797

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%	10%	10%	66%	3%	7%	37,866	Previous 5 Yr Avg	2%	12%	7%	48%	4%	27%	22,665
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
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

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%	15%	8%	11%	15%	47%	79,686	Previous 5 Yr Avg	2%	17%	8%	30%	3%	38%	19,002
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
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

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%	11%	9%	27%	9%	37%	23,585	Previous 5 Yr Avg	6%	27%	19%	10%	12%	25%	21,668
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
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

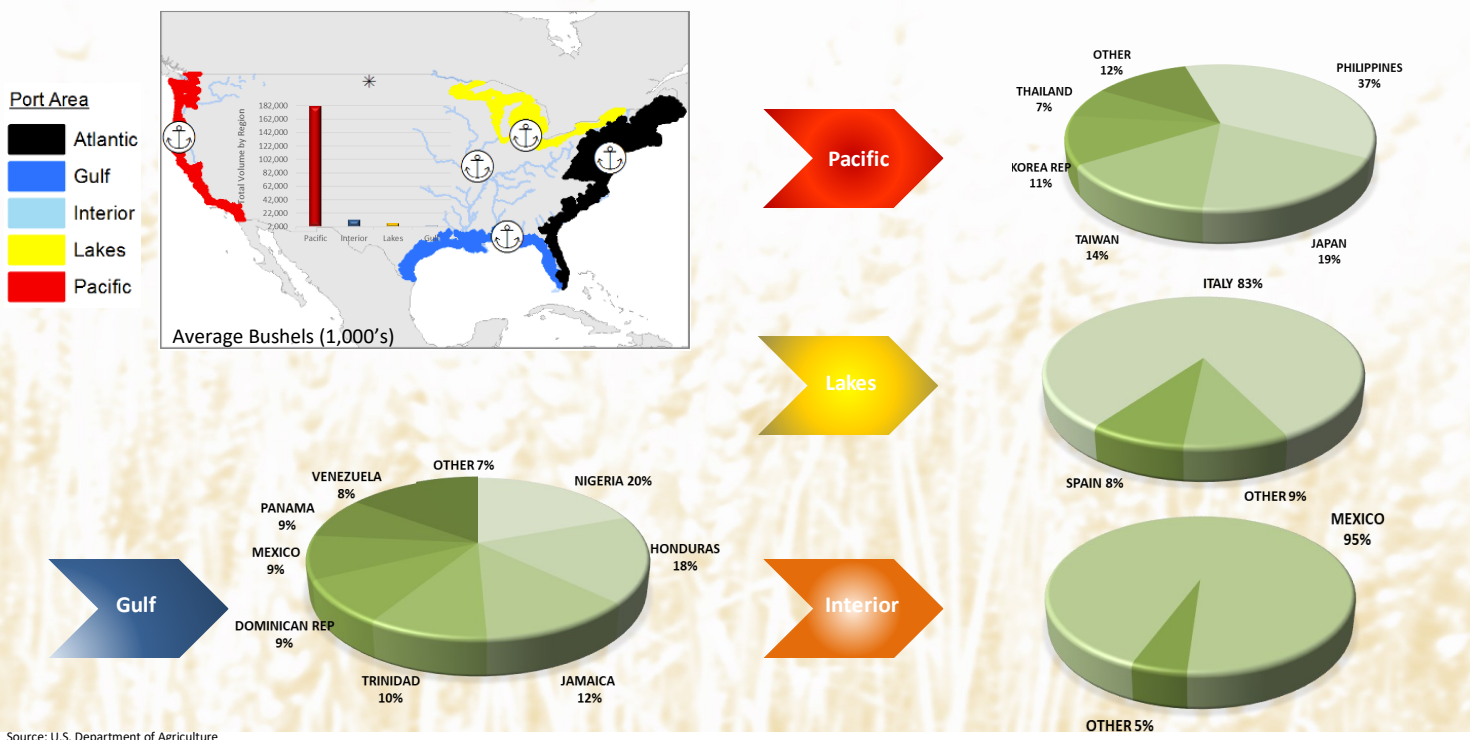
CRD 7 - Southwest								CRD 8 - South Central							
	Duluth	MN/WI	Midland	PNW	ND	Other	Total		Duluth	MN/WI	Midland	PNW	ND	Other	Total
Previous 5 Yr Avg	3%	10%	13%	49%	1%	24%	34,393	Previous 5 Yr Avg	4%	33%	15%	26%	3%	19%	19,112
2018-19	1%	4%	22%	56%	0%	17%	30,629	2018-19	4%	13%	13%	43%	0%	27%	12,854
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
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

CRD 9 - Southeast							
	Duluth	MN/WI	Midland	PNW	ND	Other	Total
Previous 5 Yr Avg	1%	49%	3%	2%	10%	35%	12,237
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
2021-22	0%	54%	5%	1%	3%	37%	9,881
2022-23	6%	57%	1%	6%	6%	23%	5,926

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