

Global Durum Wheat Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 12.8 bn
Forecast (2031)	USD 16.6 bn
CAGR (2021-2031)	4.4%
Study period	2021-2031
Largest region	Europe · 36.8%
Fastest-growing region	Middle East and Africa · 5.6%
Market concentration	Low
Licence	Individual / Company

The global durum wheat market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. World production rose to XXX tonnes in 2025/26, while consumption reached XXX tonnes as stronger food use offset weaker feed demand. Europe accounted for XX% of market value, supported by its large pasta-processing base and structurally important Mediterranean crop. Growth through 2031 will be shaped by premium pasta demand, North African food-security procurement, climate-resilient varieties, contract farming and increasingly stringent grain-quality specifications.

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Executive summary

The global durum wheat market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. World production rose to XXX tonnes in 2025/26, while consumption reached XXX tonnes as stronger food use offset weaker feed demand. Europe accounted for XX% of market value, supported by its large pasta-processing base and structurally important Mediterranean crop. Growth through 2031 will be shaped by premium pasta demand, North African food-security procurement, climate-resilient varieties, contract farming and increasingly stringent grain-quality specifications.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global durum wheat market was valued at USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- World durum production increased XX% to XXX tonnes in 2025/26, its highest level in nine years, according to the International Grains Council.
- Global consumption reached XXX tonnes in 2025/26, with food use providing the principal demand increase.
- International durum trade totaled XXX tonnes in 2025/26, equivalent to approximately XX% of world production.
- Canada produced XXX tonnes of durum in 2025, an increase of XX% from 2024, according to Statistics Canada.
- Canadian durum exports are forecast at XXX tonnes for 2025/26, preserving Canada's role as the principal internationally traded source of high-protein durum.
- The European Union harvested XXX tonnes of durum in 2024; Italy contributed XX% of that output, according to Eurostat.
- US durum production reached XXX bushels in 2025, up from XXX bushels in 2024, according to USDA NASS.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Durum Wheat Market Trends and Growth Drivers

Durum wheat occupies a specialized position within the wider wheat complex. Its value is determined not only by tonnage but by protein, gluten strength, semolina extraction, kernel vitreousness, color and contaminant performance, creating pronounced premiums between origins, grades and crop years.

Demand is comparatively defensive because most commercial durum enters staple foods with established repeat consumption. Supply is more volatile: production is concentrated in the Canadian Prairies, the Mediterranean basin, Turkey, North Africa, the northern United States and selected dryland regions where heat and rainfall variability can rapidly change yield and milling quality.

The market is moving toward closer coordination between growers, seed companies, handlers and processors. Multi-year contracts, approved-variety lists, field-level traceability and sustainability protocols are becoming central procurement tools as mills seek to stabilize throughput and meet tighter customer specifications.

Growth drivers

Pasta and convenience-food demand

Urban households are increasing consumption of shelf-stable, quickly prepared foods, reinforcing demand for dried pasta and semolina-based meal formats. The effect is strongest in emerging urban markets where pasta is gaining share alongside established couscous and noodle consumption.

North African food-security procurement

Algeria, Morocco, Tunisia and Egypt use public procurement and strategic import programmes to stabilize staple-food availability. Population growth and variable domestic harvests sustain import requirements and support Mediterranean and Canadian export channels.

Premium pasta specification

Premium pasta manufacturers pay for protein, gluten strength, yellow pigment, kernel vitreousness and consistent semolina extraction. This expands market value even when physical consumption grows more slowly and strengthens demand for segregated high-grade lots.

Contract farming and traceability

Multi-year contracts give processors greater control over varieties, agronomy and quality while providing growers with clearer price signals. Traceable procurement also supports origin claims, sustainability reporting and more resilient mill utilization.

Climate-resilient seed adoption

Breeding programmes are improving drought tolerance, disease resistance and end-use quality, reducing the probability that stressed crops fall below milling specifications. Adoption raises saleable yield and stabilizes supply in the Canadian Prairies and Mediterranean basin.

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Milling and logistics investment

New and upgraded mills, storage sites and integrated pasta plants reduce handling losses and bring processing closer to production or consumption centers. Vertically integrated operators also capture more value from specification management and by-product utilization.

Restraints

Drought and heat exposure

Durum production is concentrated in semi-arid regions where heat and moisture stress can sharply change yields, protein and kernel vitreousness. Crop volatility produces abrupt swings in exportable supply and industrial procurement costs.

Acreage competition

Growers compare durum returns with canola, pulses, barley and common wheat before planting. When relative margins weaken, acreage contracts quickly and limits the supply response to stronger processor demand.

Export-origin concentration

A substantial portion of internationally traded high-quality durum originates in Canada, the United States and a limited group of Mediterranean suppliers. Rail disruption, port congestion, export controls or harvest failure in one origin can tighten destination-market availability.

Stricter quality compliance

Mycotoxin, contaminant, pesticide-residue and grading thresholds require greater testing, segregation and documentation. Non-compliant or downgraded lots lose access to premium food channels and increase procurement costs for millers.

Price and working-capital volatility

Rapid changes in grain prices, freight rates and exchange rates increase inventory-financing requirements for traders and mills. Smaller processors face particular pressure when finished-product pricing adjusts more slowly than raw-material costs.

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Durum Wheat Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Pasta and convenience-food demand	XXX	XXX	XXX
North African food-security procurement	XXX	XXX	XXX
Premium pasta specification	XXX	XXX	XXX
Contract farming and traceability	XXX	XXX	XXX
Climate-resilient seed adoption	XXX	XXX	XXX
Milling and logistics investment	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Drought and heat exposure	XXX	XXX	XXX
Acreage competition	XXX	XXX	XXX
Export-origin concentration	XXX	XXX	XXX
Stricter quality compliance	XXX	XXX	XXX
Price and working-capital volatility	XXX	XXX	XXX

Source: XXX

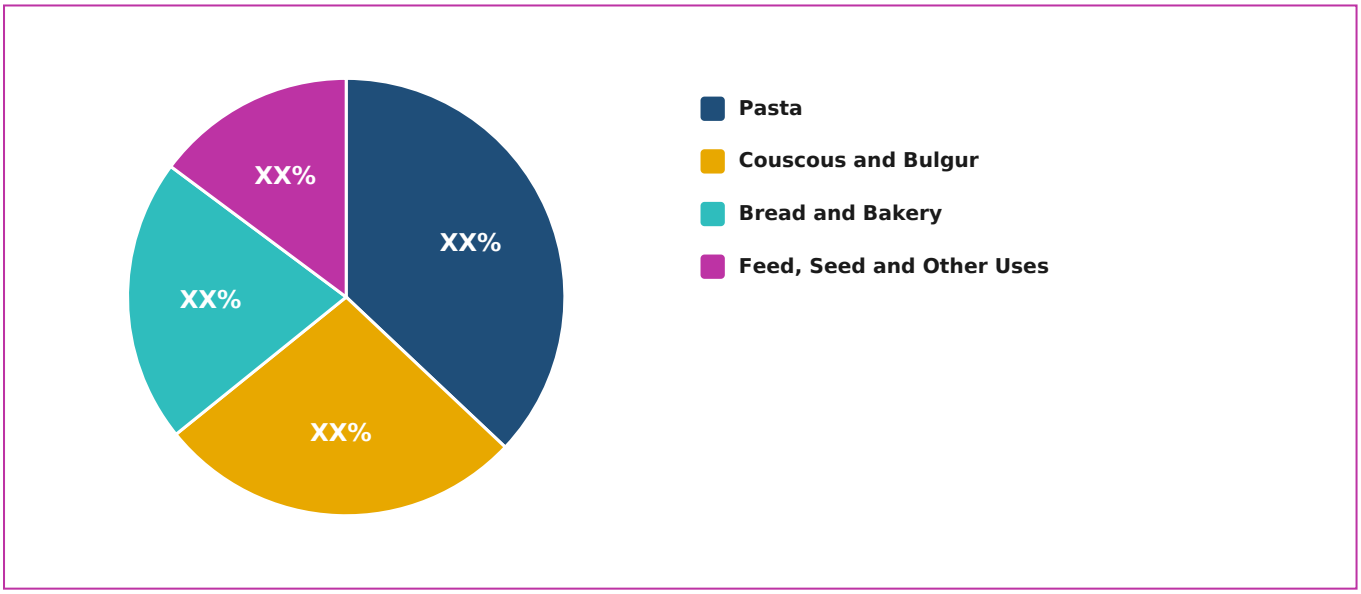
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Durum Wheat Market Segmentation Analysis

By Application

Dried and fresh pasta remain the principal outlets because durum's gluten strength, amber color and cooking performance are difficult to replicate with common wheat. Couscous and bulgur are structurally important across North Africa, the Middle East and parts of Europe. Pasta will retain leadership, while couscous and bulgur record the fastest growth as packaged staple foods and regional processing capacity expand.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Pasta	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Couscous and Bulgur	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bread and Bakery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Feed, Seed and Other Uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Quality Grade

Standard milling grades lead because they satisfy the broad requirements of mass-market semolina and pasta production. Premium high-protein grain grows faster as processors seek stronger gluten, consistent color and higher semolina yield for premium products. Lower-grade and feed durum remains a residual channel whose availability rises after weather-related quality losses.

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Value by quality Grade, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Premium High-Protein Milling Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Standard Milling Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Lower Grade and Feed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Production System

Conventional production dominates acreage, international trade and high-volume industrial milling. Organic durum remains constrained by agronomic risk, crop-rotation requirements and segregated handling costs, but it commands meaningful premiums in European and North American specialty channels. Contracted organic acreage will expand fastest near processors with established identity-preserved infrastructure.

Value by production System, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Procurement Channel

Direct contracts connect variety, agronomy and quality premiums to processor requirements and are increasingly favored by integrated millers and pasta manufacturers. Commodity traders remain essential for balancing origins, crop years and destination risk. Cooperatives and local merchants retain a strong role in farm aggregation, particularly where production is fragmented.

Value by procurement Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Processor and Grower Contracts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Commodity Traders and Merchants	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cooperatives and Local Aggregators	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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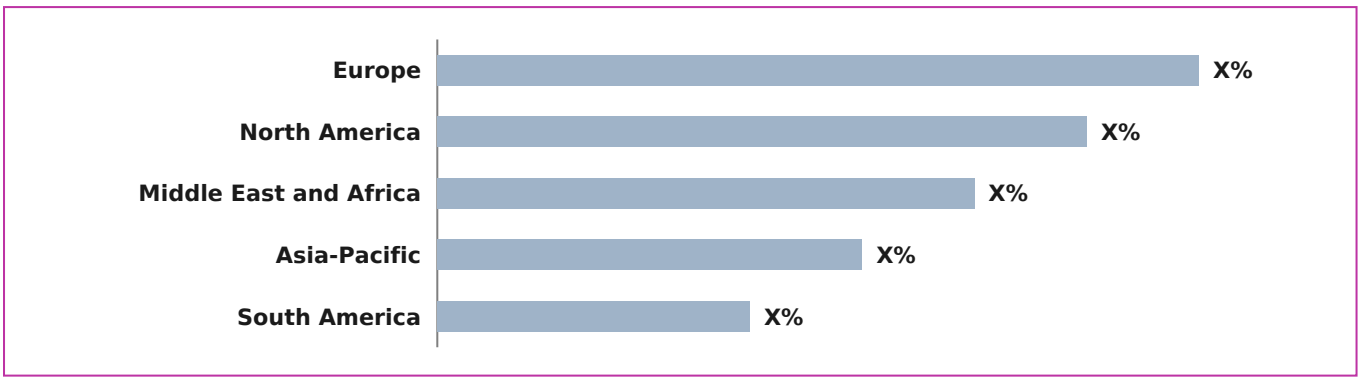
Durum Wheat Market Regional Analysis and Country Outlook

Europe held XX% of global market value in 2025. Italy remains the region's commercial center because its pasta manufacturers combine domestic grain with imported high-protein durum, particularly from Canada, to manage gluten strength, color and semolina performance. France, Spain and Greece provide additional Mediterranean supply, while EU production of XXX tonnes in 2024 underscored the region's importance despite its exposure to drought and declining cereal area.

North America accounted for XX% of value and is the decisive export-quality supply region. Canada's 7.135-million-tonne 2025 crop and 5.6-million-tonne 2025/26 export forecast place it at the center of international price formation, while the United States combines Northern Plains production with irrigated Desert Durum and a large domestic milling base. Improved 2025 Canadian crop quality expanded the availability of high-extraction, high-protein grain.

Middle East and Africa is forecast to grow fastest at XX% annually through 2031. Algeria, Morocco, Tunisia, Turkey and Egypt are supported by deeply established couscous, pasta, bulgur and bread consumption, but variable rainfall sustains import exposure. Asia-Pacific remains smaller but gains from pasta localization, Western-format convenience foods and expanding modern retail, while Argentina provides South America's principal export-oriented production platform.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
South America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Durum Wheat Market Competitive Landscape and Company Share

The global durum wheat market is fragmented at farm level and moderately consolidated in export handling, merchandising and industrial milling. Bunge, Cargill, Louis Dreyfus Company, Archer Daniels Midland, Richardson International, CHS, GrainCorp and AGT Food and Ingredients compete through origination networks, terminal access, risk management and long-term processor relationships rather than branded grain alone.

Competitive advantage increasingly rests on control of the chain from contracted acreage and variety selection through segregated storage, milling and finished pasta. Richardson International's acquisition of the 8th Avenue pasta business added a durum mill, three pasta plants and the Ronzoni brand, illustrating the strategic value of vertical integration. Bunge's combination with Viterra similarly expanded global grain origination and logistics scale.

Specialist millers and pasta-linked buyers such as Barilla, Casillo Group, La Molisana and Divella influence specification setting through direct farmer programmes and procurement premiums. Future share gains will favor companies that combine high-protein sourcing, rapid quality analytics, traceability, low-carbon cultivation programmes and dependable delivery into Mediterranean and African demand centers.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Archer Daniels Midland Company	XXX	XXX	XXX	XXX
Bunge Global SA	XXX	XXX	XXX	XXX
Cargill Incorporated	XXX	XXX	XXX	XXX
Louis Dreyfus Company	XXX	XXX	XXX	XXX
Richardson International Limited	XXX	XXX	XXX	XXX
Ardent Mills LLC	XXX	XXX	XXX	XXX
CHS Inc.	XXX	XXX	XXX	XXX
GrainCorp Limited	XXX	XXX	XXX	XXX
AGT Food and Ingredients Inc.	XXX	XXX	XXX	XXX
Casillo Group	XXX	XXX	XXX	XXX
Barilla G. e R. Fratelli S.p.A.	XXX	XXX	XXX	XXX
La Molisana S.p.A.	XXX	XXX	XXX	XXX

Source: XXX

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Durum Wheat Market Forecast and Strategic Opportunities

The market will advance from USD XXX billion in 2025 to USD XXX billion by 2031. Food use will remain the structural growth engine, while annual value performance will continue to reflect crop quality, freight, exchange rates and the premium for high-protein milling grades. Global stocks rebuilt after the tighter early-2020s cycle, but production concentration leaves the market responsive to weather shocks.

The base-case forecast assumes continued expansion in pasta, couscous and bulgur consumption, gradual adoption of improved genetics and stable international trade access. An upside scenario emerges if regenerative-contract premiums, African processing investment and premium pasta demand accelerate; the downside scenario centers on acreage loss, repeated Mediterranean drought and substitution toward lower-cost wheat blends where product standards permit.

Winning suppliers will sell specification assurance rather than undifferentiated tonnage. Identity-preserved varieties, digital traceability, dependable protein and color, verified sustainability outcomes and proximity to efficient rail or port infrastructure will command the strongest customer retention and price realization.

Opportunities

- Identity-preserved high-protein durum for premium pasta manufacturers
- Locally adapted seed genetics for Mediterranean, Canadian Prairie and North African conditions
- Regenerative and low-carbon durum programmes with verified farm practices
- Expansion of semolina and pasta capacity near fast-growing African and Asian consumption centers
- Digital grain-quality testing, traceability and segregated storage
- Organic durum and specialty varieties for premium retail and foodservice channels

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