

Global Emmer 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 288 m
Forecast (2031)	USD 462.3 m
CAGR (2021-2031)	8.2%
Study period	2021-2031
Largest region	Europe · 49.2%
Fastest-growing region	Asia-Pacific · 10.3%
Market concentration	Low
Licence	Individual / Company

The global emmer wheat market reached USD XXX million in 2025 and will expand to USD XXX million by 2031, advancing at an XX% CAGR. Europe accounted for XX% of market value, supported by Italy's established farro supply chains, protected-origin products and extensive milling expertise. Demand is broadening beyond whole and pearled grain into premium flour, pasta, bakery ingredients, ready meals and craft beverages. Organic acreage expansion, contracted regional sourcing and consumer interest in traceable ancient grains are raising emmer's value within specialty cereal portfolios.

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Table of contents

1 Introduction and Report Scope

1.1 Emmer Wheat Market Definition

1.2 Inclusions, Exclusions and Farro Terminology

2 Research Methodology

2.1 Market Sizing and Data Triangulation

2.2 Primary Interviews and Forecast Framework

3 Executive Summary

3.1 Market Snapshot and Strategic Takeaways

4 Global Emmer Wheat Market Trends and Dynamics

4.1 Market Growth Drivers

4.2 Market Restraints

4.3 Supply-Chain and Pricing Trends

4.4 Porter's Five Forces Analysis

5 Global Emmer Wheat Market Size and Forecast

5.1 Market Value and Volume, 2021-2031

5.2 Price and Scenario Forecasts

6 Emmer Wheat Market by Form

6.1 Whole and Dehulled Kernels

6.2 Pearled and Semi-Pearled Kernels

6.3 Flour and Semolina

6.4 Flakes, Grits and Other Processed Forms

7 Emmer Wheat Market by Farming System

7.1 Conventional Emmer Wheat

7.2 Certified-Organic Emmer Wheat

8 Emmer Wheat Market by Application

8.1 Bakery Products

8.2 Pasta and Noodles

8.3 Whole-Grain Dishes and Foodservice

8.4 Breakfast Cereals and Snacks

8.5 Ready Meals, Beverages and Other Applications

9 Emmer Wheat Market by Distribution Channel

9.1 Business-to-Business and Foodservice

9.2 Supermarkets and Specialty Retail

9.3 Online and Direct-to-Consumer

10 Emmer Wheat Market by Buyer Type

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10.1 Food Manufacturers
10.2 Retail Consumers
10.3 Foodservice, Institutional and Other Buyers
11 Emmer Wheat Market Regional Analysis
11.1 Europe
11.1.1 Italy
11.1.2 Germany
11.1.3 Rest of Europe
11.2 North America
11.2.1 United States
11.2.2 Rest of North America
11.3 Asia-Pacific
11.3.1 China
11.3.2 India
11.3.3 Rest of Asia-Pacific
11.4 Middle East and Africa
11.4.1 Turkey
11.4.2 Rest of Middle East and Africa
11.5 Latin America
11.5.1 Brazil
11.5.2 Rest of Latin America
12 Emmer Wheat Market Competitive Landscape
12.1 Market Concentration and Company Share
12.2 Company Profiles
12.2.1 Prometeo S.r.l.
12.2.2 Poggio del Farro S.r.l.
12.2.3 Del Colle S.r.l.
12.2.4 Bluebird Grain Farms
12.2.5 Gino Girolomoni Cooperativa Agricola
12.2.6 Pastificio Felicetti S.p.A.
12.2.7 Rustichella d'Abruzzo S.p.A.
12.2.8 Mulino Marino
12.2.9 Bob's Red Mill Natural Foods
12.2.10 American Roland Food Corp.
12.3 Recent Developments
13 Forecast Opportunities and Strategic Recommendations

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List of tables

Table 1. Global Emmer Wheat Market Snapshot, 2021, 2025 and 2031

Table 2. Leading and Fastest-Growing Emmer Wheat Segments

Table 3. Executive Opportunity Ranking by Application and Region

Table 4. Market Inclusion and Exclusion Criteria

Table 5. Emmer, Einkorn, Spelt and Durum Product Definitions

Table 6. Research Variables, Units and Currency Conventions

Table 7. Data Triangulation and Confidence Framework

Table 8. Driver Impact Matrix by Geography and Forecast Horizon

Table 9. Restraint Impact Matrix by Geography and Forecast Horizon

Table 10. Porter's Five Forces Assessment of the Emmer Wheat Market

Table 11. Emmer Wheat Supply-Chain Risks and Mitigation Priorities

Table 12. Global Emmer Wheat Market Value by Year, 2021-2031

Table 13. Emmer Wheat Value and Volume by Form, 2021-2031

Table 14. Emmer Wheat Value and Volume by Farming System, 2021-2031

Table 15. Emmer Wheat Value and Volume by Application, 2021-2031

Table 16. Emmer Wheat Value by Distribution Channel, 2021-2031

Table 17. Emmer Wheat Value by Buyer Type, 2021-2031

Table 18. Europe Emmer Wheat Market by Country, 2021-2031

Table 19. North America Emmer Wheat Market by Country, 2021-2031

Table 20. Asia-Pacific Emmer Wheat Market by Country, 2021-2031

Table 21. Middle East and Africa Emmer Wheat Market by Country, 2021-2031

Table 22. Latin America Emmer Wheat Market by Country, 2021-2031

Table 23. Regional Production, Import Dependence and Average Selling Prices

Table 24. Leading Emmer Wheat Suppliers and Estimated 2025 Market Share

Table 25. Competitor Product, Certification, Geography and Channel Matrix

Table 26. Prometeo S.r.l. Company Profile

Table 27. Poggio del Farro S.r.l. Company Profile

Table 28. Del Colle S.r.l. Company Profile

Table 29. Bluebird Grain Farms Company Profile

Table 30. Gino Girolomoni Cooperativa Agricola Company Profile

Table 31. Pastificio Felicetti S.p.A. Company Profile

Table 32. Rustichella d'Abruzzo S.p.A. Company Profile

Table 33. Mulino Marino Company Profile

Table 34. Bob's Red Mill Natural Foods Company Profile

Table 35. American Roland Food Corp. Company Profile

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Table 36. Recent Product Launches, Partnerships and Capacity Developments

Table 37. Emmer Wheat Regulatory Requirements by Major Market

Table 38. Organic Certification and Chain-of-Custody Requirements

Table 39. Emmer Wheat Trade Codes, Product Descriptions and Classification Limits

Table 40. Emmer Wheat Market Scenario Assumptions and 2031 Outcomes

Table 41. Opportunity Matrix by Market Size, Growth and Competitive Intensity

Table 42. Strategic Priorities for Growers, Processors, Brands and Investors

Table 43. Market value by year, USD bn

Table 44. Year-over-year value change

Table 45. Drivers — impact on forecast

Table 46. Restraints — impact on forecast

Table 47. Value by form, USD bn

Table 48. Value by farming System, USD bn

Table 49. Value by application, USD bn

Table 50. Value by distribution Channel, USD bn

Table 51. Value by buyer Type, USD bn

Table 52. Market value by region, USD bn

Table 53. Market value by leading country, USD bn

Table 54. Leading companies

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List of figures

Figure 1. Global Emmer Wheat Market Value, 2021-2031

Figure 2. Emmer Wheat Market Share by Region, 2025

Figure 3. Emmer Wheat Value-Chain Structure

Figure 4. Primary Interview Distribution by Respondent Group

Figure 5. CAGR Impact of Emmer Wheat Market Drivers and Restraints

Figure 6. Emmer Wheat Price Premium by Form and Certification

Figure 7. Emmer Wheat Market Share by Form, 2025

Figure 8. Emmer Wheat Application Growth Comparison, 2025-2031

Figure 9. Regional Emmer Wheat Market Value, 2025 and 2031

Figure 10. Regional Emmer Wheat CAGR, 2025-2031

Figure 11. Global Emmer Wheat Supplier Market Share, 2025

Figure 12. Competitive Positioning by Supply Control and Product Breadth

Figure 13. Certified-Organic Share of Emmer Wheat Sales by Region

Figure 14. Regulatory Compliance Intensity by Sales Channel

Figure 15. Emmer Wheat Market Forecast under Downside, Central and Upside Scenarios

Figure 16. Opportunity Attractiveness by Application

Figure 17. Value share by form, 2025

Figure 18. Value share by application, 2025

Figure 19. Growth rate by region, 2025-2031

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Executive summary

The global emmer wheat market reached USD XXX million in 2025 and will expand to USD XXX million by 2031, advancing at an XX% CAGR. Europe accounted for XX% of market value, supported by Italy's established farro supply chains, protected-origin products and extensive milling expertise. Demand is broadening beyond whole and pearled grain into premium flour, pasta, bakery ingredients, ready meals and craft beverages. Organic acreage expansion, contracted regional sourcing and consumer interest in traceable ancient grains are raising emmer's value within specialty cereal portfolios.

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

Key findings

- Global emmer wheat sales reached USD XXX million in 2025 and are forecast to reach USD XXX million in 2031.
- The market will expand at an XX% CAGR from 2025 to 2031, with processed emmer ingredients outpacing minimally processed grain.
- Europe generated XX% of 2025 market value, led by Italy's farro cultivation, milling, pasta and specialty-food ecosystem.
- Asia-Pacific is the fastest-growing region at a XX% CAGR as premium grain products gain distribution in Japan, South Korea, China and urban India.
- Whole and dehulled kernels represented XX% of 2025 sales, while flour and semolina will grow at a XX% CAGR.
- Food manufacturing accounted for XX% of demand, reflecting emmer's use in pasta, bread, crackers, breakfast products and prepared meals.
- Certified-organic products captured XX% of market value and will grow faster than conventional emmer through 2031.
- Eurostat recorded XXX hectares of agricultural land under organic farming in the European Union in 2022, strengthening the production platform available to specialty cereals.

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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 Emmer Wheat Market Trends and Growth Drivers

Emmer occupies a high-value intersection between agriculture, ingredient technology and culinary heritage. Its commercial advantage does not rest on replacing modern wheat at scale; it rests on creating products for which origin, flavour, texture and crop story command a measurable premium.

Supply economics differ sharply by region. Italy benefits from accumulated agronomic knowledge, established dehulling infrastructure and familiar consumer terminology, whereas newer production regions must coordinate seed multiplication, grower contracts, cleaning, dehulling and market development simultaneously.

The next phase of growth will be determined by usability. Suppliers that shorten cooking time, standardize flour functionality and provide traceable industrial volumes can expand emmer beyond specialist stores without diluting its premium position.

Growth drivers

Ancient-grain premiumization

Consumers increasingly associate ancient grains with culinary authenticity, whole-food nutrition and less commoditized agriculture. This supports price realization across specialty grocery, natural-food retail and chef-led foodservice while giving manufacturers a differentiated alternative to common wheat.

Organic and regenerative sourcing

Emmer fits diversified rotations and low-input production systems, aligning the crop with organic and regenerative procurement programmes. Certified supply creates access to premium retailers and ingredient buyers, while contracted cultivation improves grower confidence and varietal control.

Premium bakery and pasta innovation

Artisan bakers and pasta manufacturers use emmer flour and semolina to add nutty flavour, darker colour and a credible provenance story. Application support from mills is improving dough handling and encouraging use in blended formulations that deliver consistent production performance.

Convenient whole-grain formats

Pre-cooked pouches, quick-cook kernels, frozen grain blends and prepared bowls address emmer's traditionally long cooking time. These formats extend the grain from specialist pantry use into weekday meals, institutional foodservice and premium ready-food ranges.

Regional provenance and traceability

Identity-preserved grain, named farms and protected-origin claims reduce ambiguity around farro species and justify premium pricing. European geographical indications and North American single-origin programmes are establishing stronger links between cultivation practices, flavour and place.

New beverage applications

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Craft brewers and distillers are testing emmer for distinctive malt, whiskey and limited-edition beverage propositions. Beverage volumes remain small, but the category creates high-value demand and introduces the crop to consumers beyond bakery and grain dishes.

Restraints

Low and variable field productivity

Emmer generally yields less than modern bread and durum wheat, and its hulled architecture adds post-harvest handling requirements. The resulting cost structure limits substitution in price-sensitive foods and exposes growers to wider per-tonne cost variation.

Dehulling and processing bottlenecks

The grain's adhering hull requires specialist equipment, careful cleaning and segregation before milling or packing. Limited regional capacity raises freight costs, constrains rapid acreage expansion and can create inconsistent kernel integrity.

Farro species ambiguity

Farro can refer to emmer, einkorn or spelt, producing inconsistent specifications across retail listings and international trade. Buyers increasingly require botanical identification and chain-of-custody documentation, adding qualification costs but rewarding disciplined suppliers.

Gluten and allergen constraints

Emmer is wheat and contains gluten, preventing participation in the gluten-free category and requiring wheat-allergen declarations. Misleading tolerance narratives create compliance and reputation risks for brands that do not communicate the product accurately.

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Driver and Restraint Impact on the Emmer Wheat Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Ancient-grain premiumization	XXX	XXX	XXX
Organic and regenerative sourcing	XXX	XXX	XXX
Premium bakery and pasta innovation	XXX	XXX	XXX
Convenient whole-grain formats	XXX	XXX	XXX
Regional provenance and traceability	XXX	XXX	XXX
New beverage applications	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Low and variable field productivity	XXX	XXX	XXX
Dehulling and processing bottlenecks	XXX	XXX	XXX
Farro species ambiguity	XXX	XXX	XXX
Gluten and allergen constraints	XXX	XXX	XXX

Source: XXX

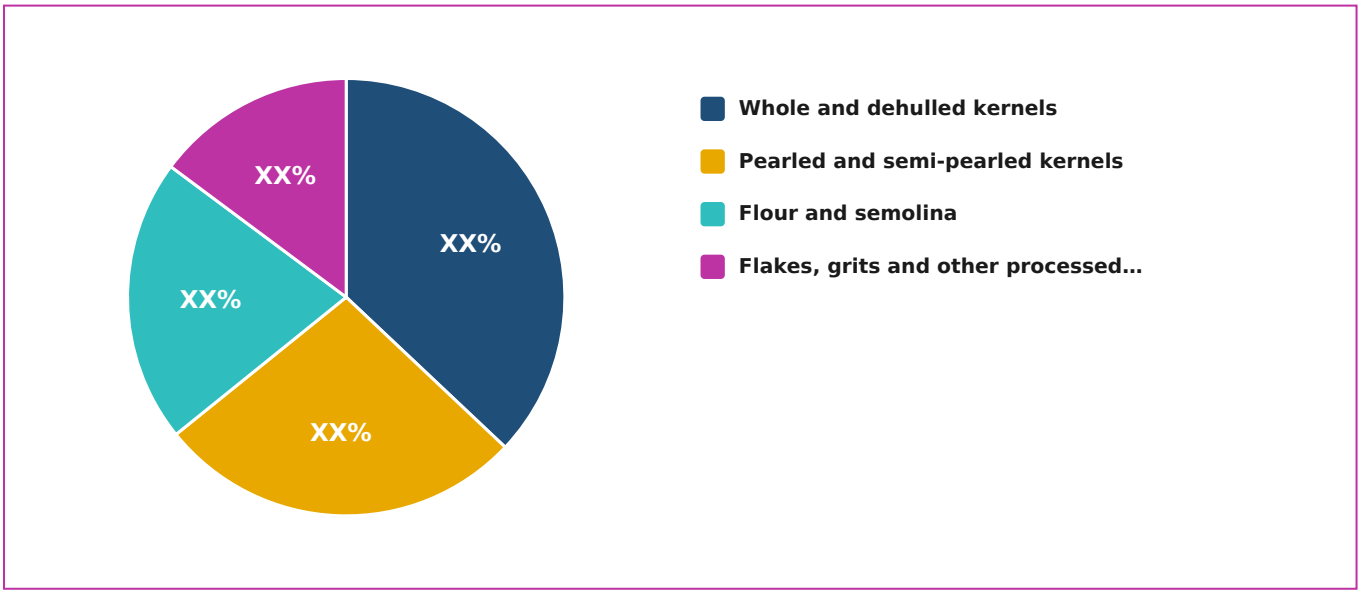
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Emmer Wheat Market Segmentation by Form, Farming System, Application and Channel

By Form

Whole and dehulled kernels retain the largest share because they serve retail farro, foodservice and further-processing demand. Pearled products trade faster cooking against reduced bran content. Flour and semolina will grow at XX% as mills develop application-specific specifications for bakery and pasta customers, while flakes, grits and sprouted ingredients occupy high-value niches.

Value share by form, 2025



Source: XXX

Value by form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Whole and dehulled kernels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pearled and semi-pearled kernels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Flour and semolina	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Flakes, grits and other processed forms	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Farming System

Conventional emmer remains larger because important traditional production areas and foodservice supply chains are not uniformly certified. Organic emmer commands a substantial value premium and benefits from strong alignment with specialist retailers and low-input farming narratives. Regenerative certifications

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and documented soil practices are adding a second layer of differentiation within both systems.

Value by farming System, USD bn

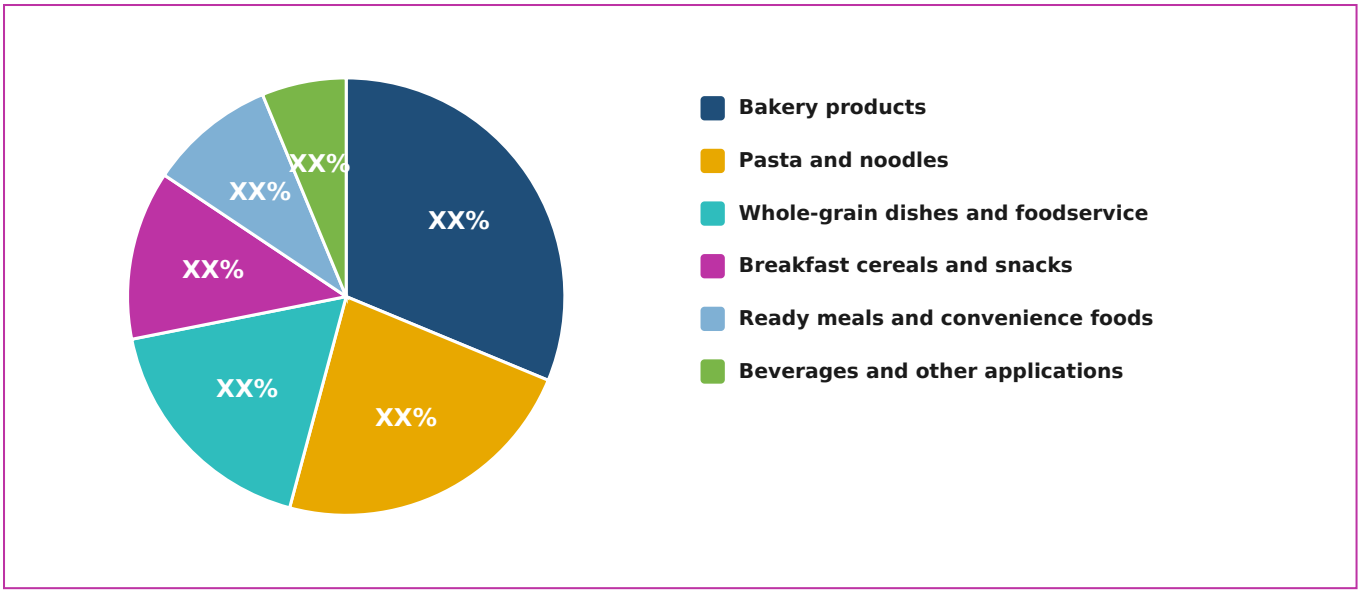
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Certified organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Bakery leads through breads, sourdough, crackers, biscuits and flour blends, supported by emmer's flavour and provenance. Pasta and noodles form a strong Italian-centred segment, while whole-grain dishes sustain retail and foodservice demand. Ready meals will grow fastest as pre-cooking technology reduces preparation time, and beverages will remain a smaller but high-value innovation field.

Value share by application, 2025



Source: XXX

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Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Bakery products	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pasta and noodles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Whole-grain dishes and foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Breakfast cereals and snacks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ready meals and convenience foods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Beverages and other applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Direct and distributor-led B2B sales dominate because food manufacturers, mills, bakeries and foodservice operators buy bulk grain, flour and semolina. Store-based retail remains important in Italy and natural-food markets. Online channels are growing fastest by overcoming limited physical distribution and enabling specialist producers to sell high-value packs directly across wider territories.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Business-to-business and foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supermarkets and specialty retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online and direct-to-consumer	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Buyer Type

Manufacturers lead because bakery, pasta, cereal, snack and meal producers aggregate substantial ingredient volumes. Retail consumers purchase higher-value packaged grain and flour but in smaller lots. Foodservice buyers prioritize consistency, cooking performance and holding quality, while institutional demand is emerging through local-procurement and nutrition programmes.

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Value by buyer Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Food manufacturers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail consumers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice operators	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Institutional and other buyers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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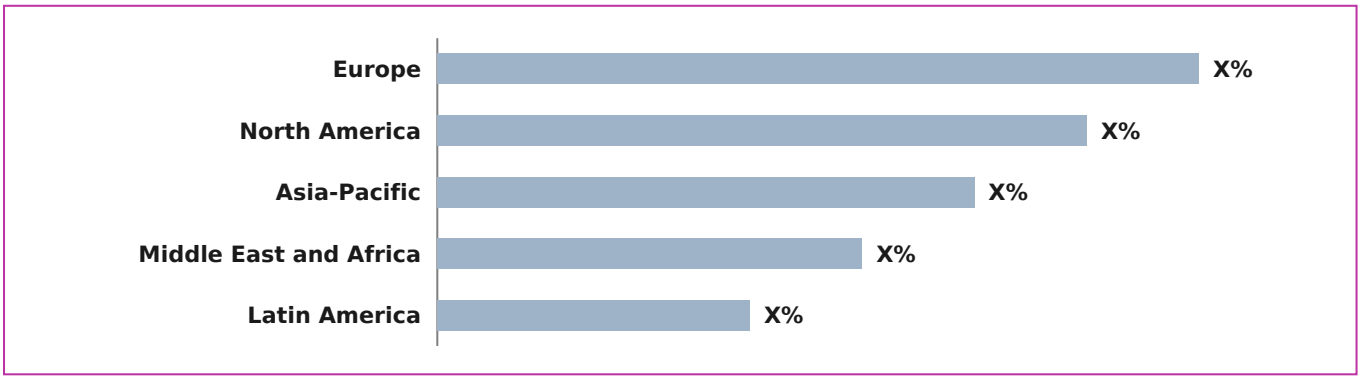
Emmer Wheat Market Regional Analysis and Country Outlook

Europe generated USD XXX million in 2025, equal to XX% of global sales. Italy anchors the region through a dense network of growers, dehullers, stone mills, pasta makers and packaged-food specialists, while Farro della Garfagnana PGI reinforces origin-based differentiation. Germany, France, Austria and the United Kingdom provide additional demand through organic retail, artisan bakery and specialist milling channels.

Asia-Pacific will record the fastest regional CAGR of XX% through 2031. Japan and South Korea are early premium-import markets, while China and India offer a larger long-term opportunity through e-commerce, upscale supermarkets, bakery ingredients and health-oriented packaged foods. Del Colle's 2024 launch of Tuscan emmer in South Korea demonstrates the region's appetite for traceable imported grains.

North America is developing a vertically integrated domestic segment alongside imports from Italy. Bluebird Grain Farms, University of Wyoming's Wyoming First Grains initiative and specialist mills are building local cultivation and consumer awareness, while emmer-based whiskey and prepared-food applications extend demand beyond whole-grain retail. Turkey and Ethiopia retain strategically important cultivation traditions, and Latin America is emerging from a smaller base through premium natural-food channels.

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
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin 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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Emmer Wheat Market Competitive Landscape and Company Share

The market remains fragmented, with the ten largest suppliers representing XX% of 2025 sales. Italian specialists compete through grower contracts, certified seed, origin claims and application breadth, while North American companies emphasize single-origin grain, organic certification and direct relationships with chefs, mills and consumers.

Prometeo differentiates through a controlled Italian supply chain that provides selected seed, pre-agreed grower pricing and full traceability. Poggio del Farro, Del Colle, Girolomoni, Felicetti and Rustichella d'Abruzzo extend competition into retail grain, flour, pasta and export channels. Bluebird Grain Farms has built a distinctive domestic US position around whole-grain emmer and integrated dehulling.

Competitive strategy is moving toward contracted acreage, regenerative certification, quick-cook processing and manufacturer-ready flour or semolina specifications. Acquisitions remain less influential than partnerships among breeders, growers, mills, co-packers and food manufacturers; capacity investments in cleaning, dehulling and controlled milling will therefore shape share gains through 2031.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Prometeo S.r.l.	XXX	XXX	XXX	XXX
Poggio del Farro S.r.l.	XXX	XXX	XXX	XXX
Del Colle S.r.l.	XXX	XXX	XXX	XXX
Bluebird Grain Farms	XXX	XXX	XXX	XXX
Gino Girolomoni Cooperativa Agricola	XXX	XXX	XXX	XXX
Pastificio Felicetti S.p.A.	XXX	XXX	XXX	XXX
Rustichella d'Abruzzo S.p.A.	XXX	XXX	XXX	XXX
Mulino Marino	XXX	XXX	XXX	XXX
Bob's Red Mill Natural Foods	XXX	XXX	XXX	XXX
American Roland Food Corp.	XXX	XXX	XXX	XXX

Source: XXX

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Emmer Wheat Market Forecast, Investment Priorities and Opportunities

The global market will add USD XXX million between 2025 and 2031. Flour, semolina and convenience-oriented kernel formats will generate a growing share of this increase as emmer moves from specialty grain shelves into bakery, pasta, prepared meals and premium foodservice.

Under the central forecast, contracted production and improved dehulling capacity keep supply aligned with demand while average selling prices retain a premium over common wheat. Faster development of quick-cook formats and Asian retail distribution would lift the market above USD XXX million by 2031; weaker harvests and insufficient processing investment would hold the market near USD XXX million.

Winning suppliers will combine verified Triticum dicoccum identity, stable grower economics, application-specific processing and disciplined origin communication. Businesses relying on undifferentiated farro claims will lose ground to suppliers that can document variety, farm, certification status and milling performance.

Opportunities

- Contract-grown emmer for premium bakery and pasta manufacturers
- Pre-cooked, quick-cook and frozen emmer formats
- Sprouted, malted and fermented emmer ingredients
- Geographically indicated and single-origin product ranges
- Emmer-based brewing, distilling and non-alcoholic malt beverages
- Drought-resilient specialty-crop programmes in semi-arid regions
- Direct sourcing partnerships between growers and Asian premium-food distributors

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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