

DURUM WHEAT, SEMOLINA & PASTA

MARKET UPDATE JULY 2025

As a trusted importer and distributor of premium durum-based products including Italian pasta, French couscous, and European semolina, we're committed to providing our customers with actionable insights to navigate the current market. This update covers essential trends in durum wheat supply, pricing dynamics, and strategic purchasing recommendations to support optimal procurement.

Global Durum Wheat Market Overview: Key Supply and Pricing Drivers

- **Robust European Production:** The 2025 harvest across Italy, Spain, and Greece is among the most abundant in recent years. Italy reports high-quality output, while Greece expects a record 1.2 MMT harvest, though protein levels are slightly below average.
- **Canadian Drought Watch:** Canadian crops are progressing, but drought conditions in Saskatchewan and Alberta pose a medium-term supply risk. Export prices remain firm with limited farmer selling due to weak CAD/USD exchange rates.
- **Stable Prices, Strong Demand:** European durum prices have stabilized. Buyer interest is high, but sellers remain cautious. Imports from Turkey remain non-competitive due to domestic price controls and export restrictions.

Product-Specific Considerations

- **Italian Pasta:** The solid harvest and stable pricing are reducing input costs for Italian pasta. We maintain full supply chain visibility to ensure consistency, with our partners continuing sustainable practices in production and logistics.
- **French Couscous:** While France's domestic harvest is recovering, competition from Turkish and Russian suppliers is reshaping export dynamics. We continue to prioritize traceable, high-quality couscous sources.
- **European Semolina Flour:** Prices remain attractive for semolina buyers, now is an opportune time to build or replenish stock.

Recommendations

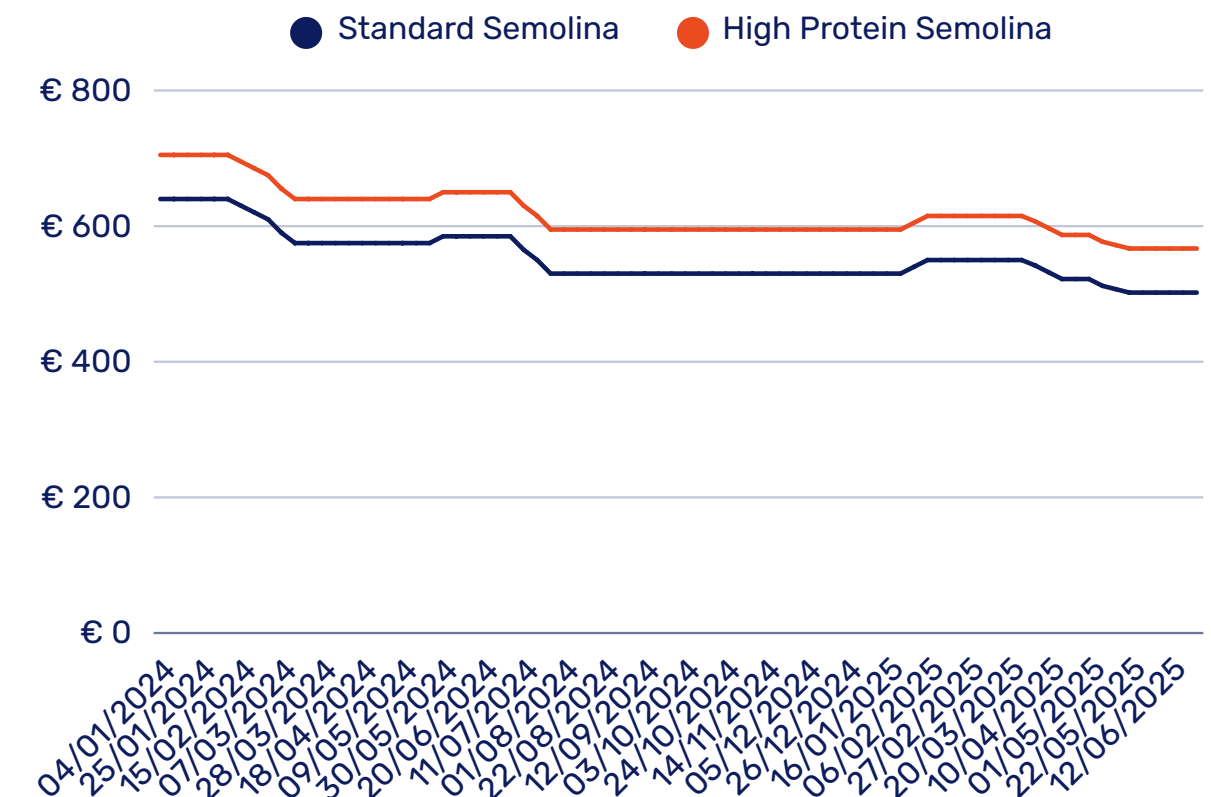
With prices flatlining at historically attractive levels, contracting for the next 6–9 months locks in savings and shields your procurement from exchange rate volatility, weather and other trade disruptions.

As some origins deliver higher yields with lower protein, early contracting allows better quality control, especially for pasta manufacturers requiring consistent performance. Should drought worsen in Canada, global supply tightening could lift prices into Q4 2025 and early 2026. Early action ensures uninterrupted supply amid global uncertainties.

Conclusion

Current durum wheat market conditions favour strategic early purchasing. We recommend contracting Italian pasta, French couscous, and semolina for supply through Q1 2026. This ensures pricing certainty and reliable inventory for your production.

For tailored sourcing strategies or updates, please contact us. Our integrated supply chain and quality commitment continue to deliver performance you can trust.



For more information and assistance please get in touch!

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