

## **Wheat - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-09-01 | 120 pages | Mordor Intelligence

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### **Report description:**

Wheat Market Analysis

The wheat market size stood at USD 240 billion in 2025 and is forecast to reach USD 294.8 billion by 2030, advancing at a 4.2% CAGR during the period. Record global harvests are increasing, while wheat's 20% share of global caloric intake secures a stable demand base. Expansion of Asia-Pacific milling capacity, commercialization of drought-tolerant cultivars, and widening biofuel mandates collectively expand profit pools for exporters. Supply-side innovation, such as hybrid wheat, AI-guided agronomy, and variable-rate fertilization, reduces production risk but amplifies capital requirements. The market's forward trajectory is supported by the adoption of technological advancements, with artificial intelligence-driven yield forecasting platforms gaining traction across major production regions and precision agriculture technologies enhancing resource optimization. Government biofuel blending mandates create additional demand streams, while trade liberalization efforts, despite periodic setbacks from export restrictions, continue to facilitate global market integration and price discovery mechanisms.

Global Wheat Market Trends and Insights

Rising Demand for Fortified Wheat-Based Foods

Consumer focus on functional nutrition lifts premium pricing for iron-, zinc-, and probiotic-enriched breads, noodles, and breakfast cereals. Clinical trials show probiotic fortification maintains viable counts after baking, validating health-claim labeling. Large Asian and North American retailers have doubled shelf space for fortified wheat goods since 2024, stimulating upstream orders for

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specialty flours. Universities in the United States released soft white varieties designed to achieve proper loaf volume without chemical improvers, reducing bakery additive costs by USD 300,000 per 10,000 metric tons production run. Government nutrition programs in India and the Philippines now subsidize micronutrient-dense flour, accelerating scale.

### Expansion of Wheat-Based Convenience Products

Rising urban incomes steer consumers toward instant noodles, ready-to-eat flatbreads, and frozen bakery, all of which hinge on consistent flour quality. New mills in Papua New Guinea and Sweden add 1.2 million metric tons of annual grinding capacity, integrating AI control rooms that trim energy consumption by 12%. Snack manufacturers lock multiyear supply contracts to hedge against volatility, incentivizing processors to invest in optical sorters that meet tight defect tolerances. E-commerce grocery platforms further amplify pull-through by offering same-day delivery of par-baked loaves, thereby shortening reorder cycles for millers.

### Volatility in Fertilizer Prices

Natural gas price swings doubled urea quotes between 2022 and 2024, slicing wheat grower margins by up to USD 65 per hectare. Russia and Belarus supply disruptions further tightened phosphate markets, with DAP inventories in East Africa dropping to 43-day cover. Credit-constrained smallholders in Ethiopia and Bangladesh cut nutrient application by 15%, translating into lower yields and higher quality discounts. Multinational agro-input firms responded by expanding sulfate-of-potash blending in Morocco, yet pass-through time lags caused regional price distortions. Although green ammonia projects promise to delink nitrogen costs from fossil energy, scalability before 2030 remains uncertain, limiting relief in the medium term.

Other drivers and restraints analyzed in the detailed report include:

Government Biofuel Blending Mandates / Heat-Tolerant Wheat Cultivar Commercialization / Geopolitical Export Restrictions /

For complete list of drivers and restraints, kindly check the Table Of Contents.

### Geography Analysis

Asia-Pacific accounted for 38% of the wheat market share in 2024. North America keeps a resilient export posture backed by modern storage, rail, and river networks. U.S. shipments are forecast to climb to 27 million metric tons in 2025/26, helped by a weaker dollar and ample on-hand stocks. Policy clarity on gene-edited crops accelerates rollout of hybrid lines, yet episodic droughts in the High Plains increase production volatility and insurance claims. Canada's Prairies, though vulnerable to moisture deficits, leverage higher-protein spring wheat premiums that cushion revenue swings. Climate-smart commodity grants worth USD 3.1 billion catalyze regenerative practices such as split fertilizer applications that cut nitrous oxide emissions.

Africa's 5.4% CAGR through 2030 outpaces population growth as urban diets pivot toward wheat-based bread and pasta. Europe remains a pivotal supplier to North Africa and the Middle East despite yield swings from erratic rainfall. Ukrainian grain helps bolster food security while appeasing member-state producers wary of price depressions. Stringent mycotoxin tolerances and sustainability schemes like Farm to Fork raise compliance costs but allow European exporters to command quality premiums. Investments in remote-sensing platforms now enable co-ops to forecast field-level protein prior to harvest, optimizing segregation strategies.

Asia-Pacific exhibits the widest spectrum of production systems, from high-input northern Chinese mega-farms to smallholder-dominated South Asian plots. Australia expects 30.6 million metric tons of output in 2025 on the back of conservation tillage, countering rainfall decline trends. Precision-sprayer adoption in Chinese provinces curbed herbicide use by 18%, improving

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margins and environmental scores. Conversely, Indonesia and the Philippines remain almost entirely import-reliant, exposing consumers to global price gyrations. Regional free-trade agreements lower tariff barriers, yet non-tariff hurdles such as sanitary protocols still slow cross-border flows.

List of Companies Covered in this Report:

Market Overview / Market Drivers / Market Restraints / Regulatory Landscape / Technological Outlook / Value/Supply-Chain Analysis / PESTEL Analysis / List of Stakeholders /

Additional Benefits:

The market estimate (ME) sheet in Excel format /  
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