



Securing Global Markets for Canadian Wheat Report

2025-2026



Securing Global Markets for Canadian Wheat

Canada is a leading global exporter of cereal commodities and proudly holds the position as the world's number one exporter of durum wheat and oats. With over 28 million tonnes of wheat expected to reach over 80 international markets in 2025-2026, Canada is on track to be the third largest wheat exporter and number one exporter of high quality, high-protein wheat in the world.

Canada's cereals sector leads the country's agriculture exports with annual exports to over 80 countries with an estimated value of \$12.1 billion CAD. The global scale and scope of our exports demonstrate the flexibility and value that Canadian cereals offer to our customers and provide valuable market diversification.



Canadian-grown cereals have an estimated total impact of **\$68.8 billion**, including more than **370,000 Canadian jobs**, and **\$27 billion in wages.**

(Source: *The Economic Impact of Cereal Grains on the Canadian Economy*, GlobalData, 2023)

This report includes a snapshot of six markets that were part of the market development activities undertaken in 2025 by Cereals Canada, including the New Crop Trade and Technical Missions, webinars, technical exchanges, virtual meetings, and market access outreach in core and emerging markets.



Canadian Wheat is Quality

Each year, Cereals Canada produces its New Wheat Crop Report: a quality analysis of the years' wheat crop.

The report includes technical data on the quality of Canada Western Red Spring (CWRS), Canada Western Amber Durum (CWAD), Canada Eastern Soft Red Winter (CESRW), and Canada Prairie Spring Red (CPSR) or Wheat by Specification.

In 2025, Canadian farmers grew nearly 40 million tonnes of wheat. This represents an 11 percent increase over the previous year and is 23 percent larger than average, thanks to higher-than-average yields for both non-durum and durum wheat.

- The majority of wheat graded No. 1 or No. 2.
- Despite variable growing conditions across the Prairies, timely mid-summer rains supported higher-than-average yields. In Eastern Canada, favorable weather throughout the growing season for winter wheat resulted in strong yields and good quality.
- Wheat protein content was comparable to average.
- All wheat classes from the 2025 crop year had good test weights. Higher-than-average thousand kernel weights were seen for all Western composites.



Canada's New Wheat Crop Report, Growing Quality

2025 Crop Summary



Read the 2025 New Wheat Crop Report and download your copy of the Crop Summary for CWRS, CWAD, CESRW, and Wheat by Specification at:

[2025 New Wheat Crop Report](#)

If you are interested in learning about the quality of Canada Western Red Winter (CWRW), email

info@cerealscanada.ca

to request your quality analysis report.

Maintaining and Growing Markets

Our technical support activities help build strong relationships and open communication channels that support market growth.

We generate and analyze data that directly supports end-users in understanding the benefits of Canadian cereals and in making high-quality end-products. We also investigate and resolve milling and product quality issues that are identified by industry and customers.

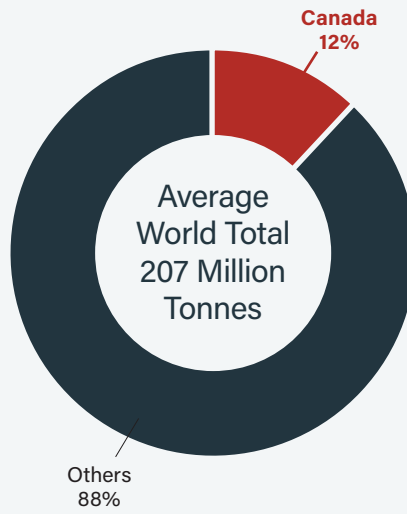
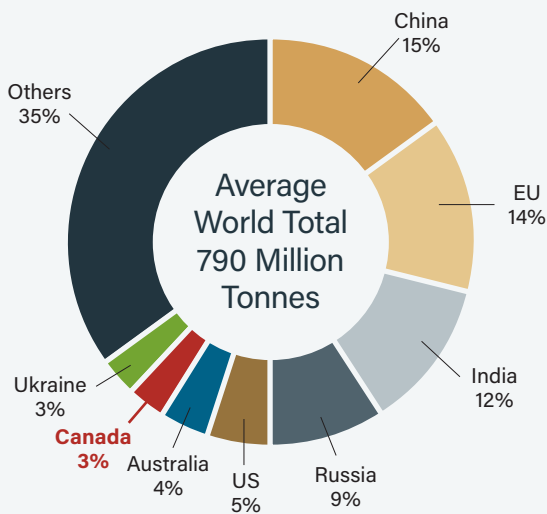


Ongoing engagement with international customers is essential to maintain and strengthen Canada's competitive position in global markets.

Canada and the World: Wheat (2020-2024)

World Wheat Production

World Wheat Trade



Source: International Grains Council, 2025

“Canadian wheat has given us high quality standards. This makes it hard to buy wheat from other sources.”

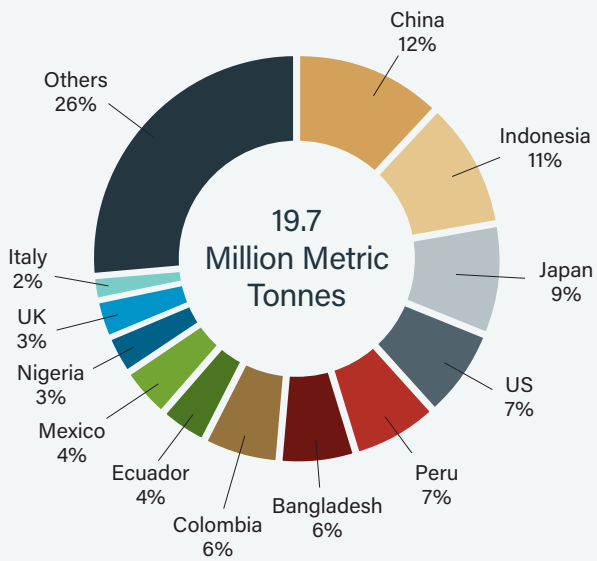
—Customer in Morocco



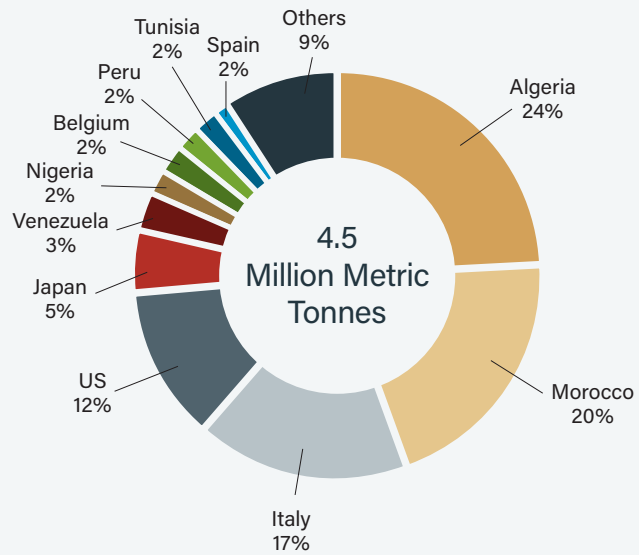
Maintaining and Growing Markets

Canadian Wheat Exports (2021-2025)

Annual Export Shares for Canadian Non-Durum Wheat



Annual Export Shares for Canadian Durum Wheat



Source: Statistics Canada, 2026

“Canadian wheat makes excellent flour which contributes to the Japanese bread and noodle markets. Japan’s rich food culture is supported by efforts of (the) Canadian wheat industry.”

—Customer in Japan



Market Support Activities

Cereals Canada provides customized training and targeted technical support to ensure that customers understand the quality characteristics that are unique to Canadian cereals and how to optimize their performance in milling and end-product processing.

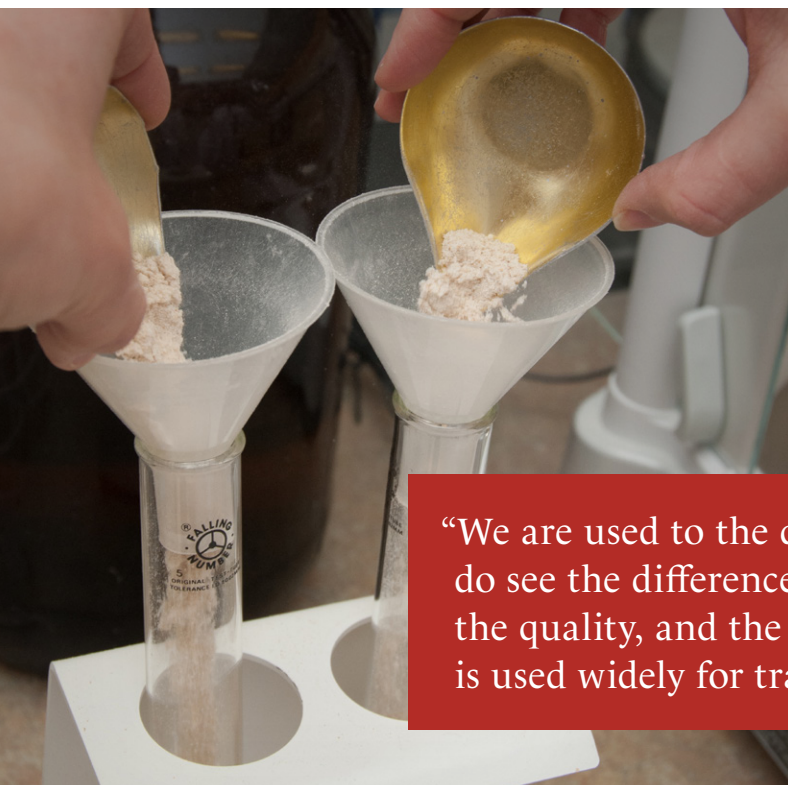
Market support activities are specifically designed to target customer needs and demonstrate the quality of Canadian wheat classes.

Some of the activities include:

- Targeted technical exchanges held in-market or at the Cereals Canada facilities
- Addressing in-market technical and market access issues
- Cereals Canada International Overview, our flagship program targeting core markets, held every July in Winnipeg
- New Crop Trade and Technical Missions



In 2024-2025, Cereals Canada engaged with **63 countries** delivering Canada's quality and functionality reports to global buyers. This included **59 current international buyers** of Canadian cereals, whose combined average purchases of Canadian cereals are valued at **\$11.2 billion.**



Targeted global buyer engagement includes:

- New Wheat Crop Report and webinar
- Growing Season and Market Update webinars
- Growing Season Progress Report
- On-demand Webinars
- Technical Bulletins
- Publications

Also, one-on-one meetings to provide customer support throughout the year, through direct contact with customers and the value chain, at their request.

“We are used to the quality of Canadian wheat, and we do see the difference while using other wheat. We trust the quality, and the handbook created by Cereals Canada is used widely for training staff.”
—Customer in Bangladesh

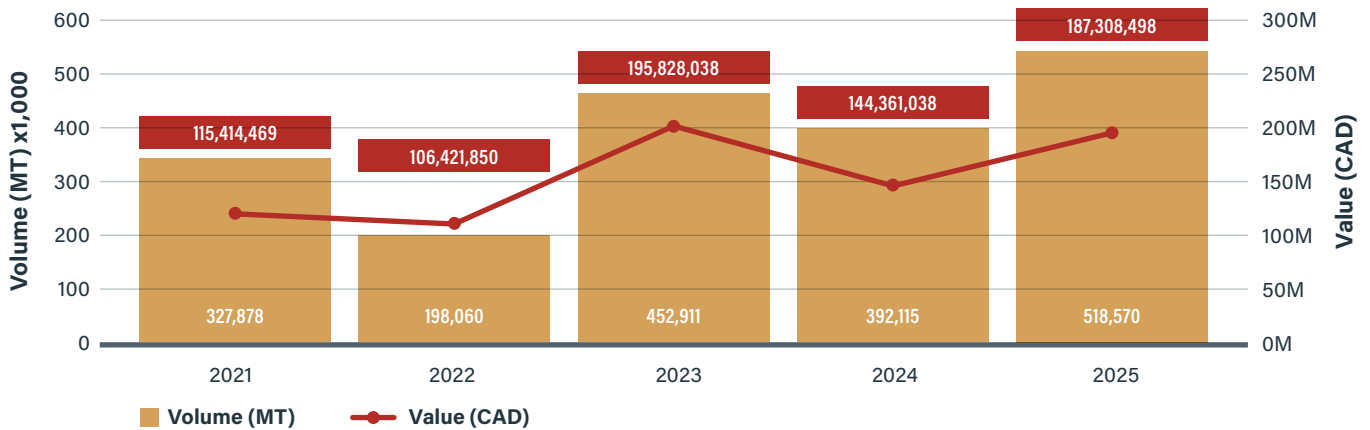
Secondary Market Guatemala



Guatemala is the largest market for Canadian wheat in Central America. Exports to Guatemala have grown significantly in recent years—from 16,000 tonnes in 2019 to more than half a million tonnes in 2025.

Exports of Canadian Non-Durum and Durum Wheat

Source: Statistics Canada

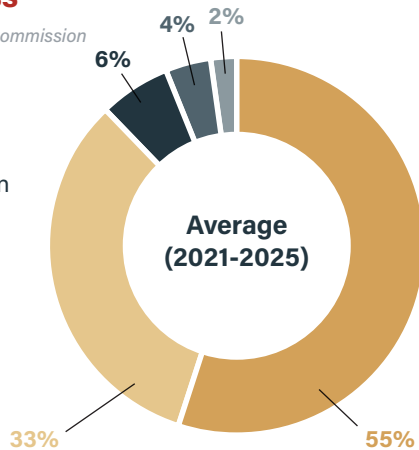


Average Exports of Canadian Wheat by Class

Source: Canadian Grain Commission

Class & Grade

- By Specification
- CWRS No.2
- CWAD No.2
- CWRS No.1
- CWAD No.1

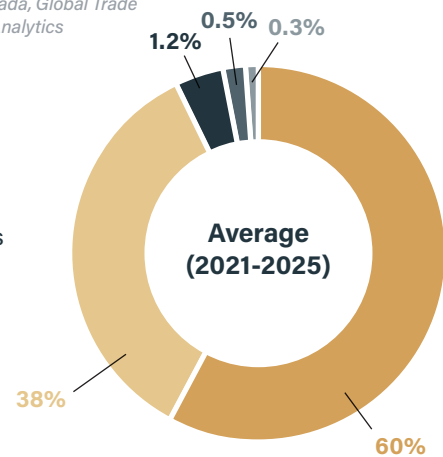


Wheat Imports by Origin

Sources: Statistics Canada, Global Trade Tracker, LSEG Data & Analytics

Exporter

- Canada
- United States
- Mexico
- Russia
- Others



Secondary Market Guatemala



Bread is a staple food in Guatemala, and the country is also a key exporter of bakery products across Central America, Mexico, and the United States.



Cereals Canada supports this important market through regular, direct engagement with leading millers, providing technical support, training, and expertise focused on optimizing the performance of Canadian wheat.

A key partner is Molinos Modernos, a division of CMI Foods and the dominant miller in Central America, which imports CWRS, CPSR, CESRW, and CWAD. With more than 800,000 tonnes of Canadian wheat purchased in 2023 and 2024, the company values the consistent quality and reliability of Canadian supply.

Cereals Canada's hands-on technical support helps millers address technical challenges, improve milling efficiency, and build confidence in Canadian wheat, reinforcing a long-term relationship. Support to bakers through the What About Wheat? brand reinforces the nutritional properties of wheat and how it can be part of a healthy diet.



“Because of this visit we are going to start sourcing a lot more Canadian wheat. Being able to call people who can help problem solve milling issues pays for the extra cost of the wheat.”

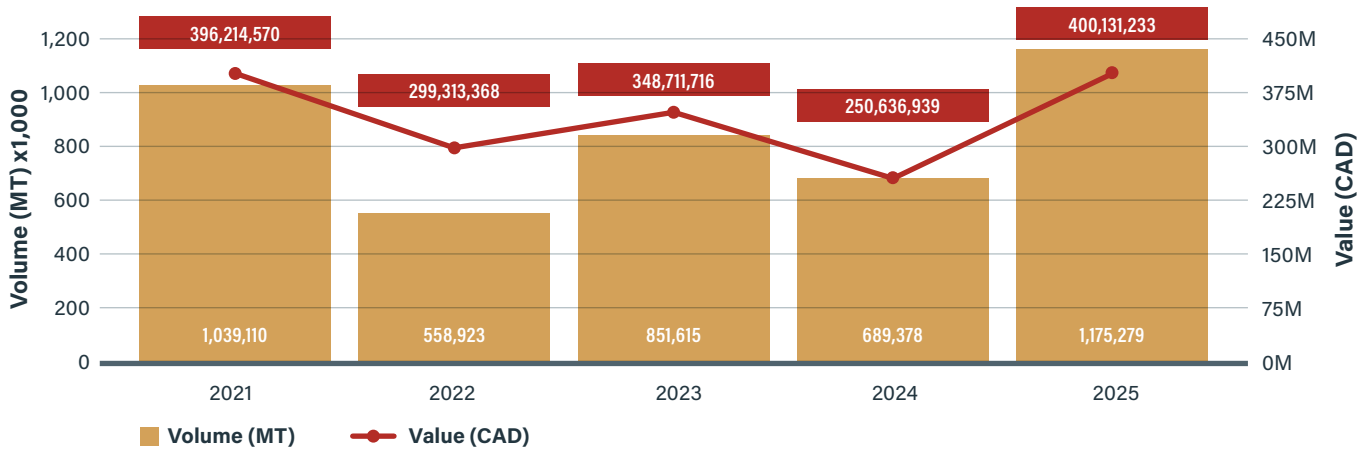
—Customer in Guatemala

Secondary Market Ecuador



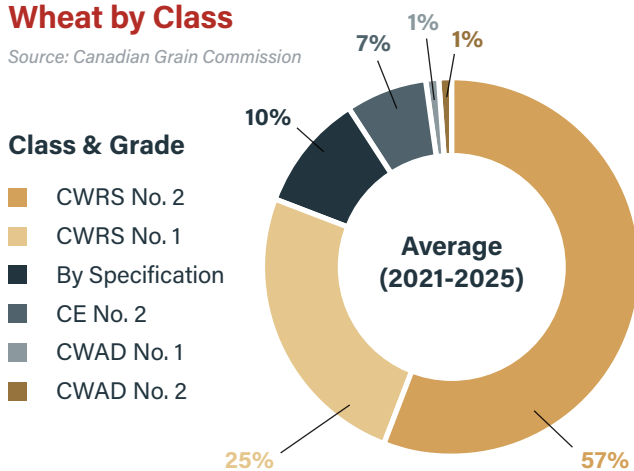
Exports of Canadian Non-Durum and Durum Wheat

Source: Statistics Canada



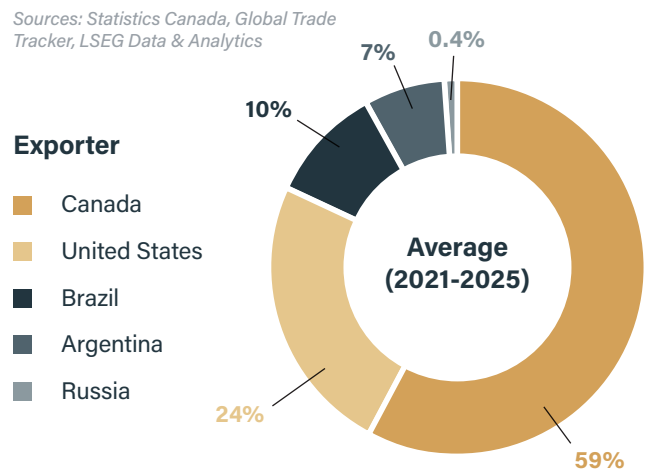
Average Exports of Canadian Wheat by Class

Source: Canadian Grain Commission



Wheat Imports by Origin

Sources: Statistics Canada, Global Trade Tracker, LSEG Data & Analytics

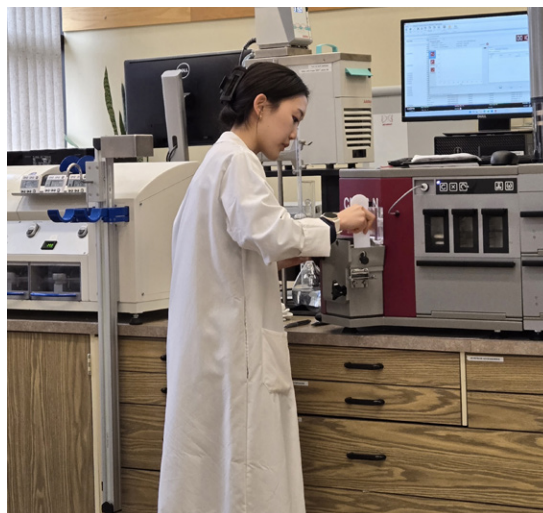


Over the past five years, Canada has exported an average of 851,000 tonnes of non-durum wheat to Ecuador each year. As a result, Ecuador ranks among Canada's largest wheat export markets, accounting for approximately four percent of Canada's average annual non-durum wheat exports. Canada is the leading supplier of non-durum wheat to Ecuador, holding an average market share of around 60 percent.

Secondary Market Ecuador



Cereals Canada provides ongoing market support in Ecuador through buyer engagement, technical training, and targeted support for baked goods and pasta production. Ecuador primarily imports CWRS, which is used extensively in the production of bread and other baked products. Pasta manufacturers also use CWRS to produce fine semolina for lower-priced pasta products.



Cereals Canada works directly with millers and food processors to help optimize wheat blends, improve processing performance, and manage product quality in a market where blending wheats of varying origins and quality levels is common.

Canada has been the leading supplier of non-durum wheat with an average market share of 58 percent over the past five years to Ecuador. This reflects strong customer confidence in Canadian wheat. Cereals Canada's hands-on technical support reinforces this preference by ensuring customers can consistently achieve high-quality end products using Canadian wheat.



“We should be proud of the quality of wheat grown in Canada. From breeders to farmers, Canadian wheat is award winning and globally recognized as a symbol of quality.”

— Lisa Nemeth, Director of Market Support and Training



Pani Plus flour, produced by Moderna Alimentos, won the Superior Taste Award from the Taste Institute in 2023.

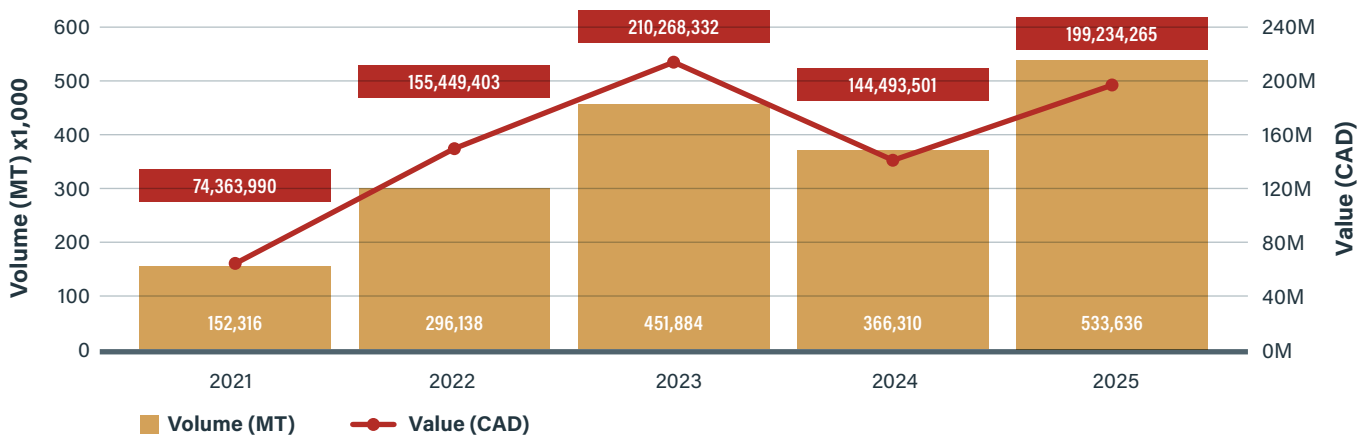
Secondary Market The Philippines



Over the past five years, the Philippines imported an average of 360,000 tonnes of Canadian non-durum wheat annually. In 2025, Canada's exports to the Philippines reached a ten-year high, exceeding half a million tonnes. While CWRS remains well established in the market, buyers have also shown growing interest in CPSR, other medium-protein wheats, and soft wheat.

Exports of Canadian Non-Durum and Durum Wheat

Source: Statistics Canada

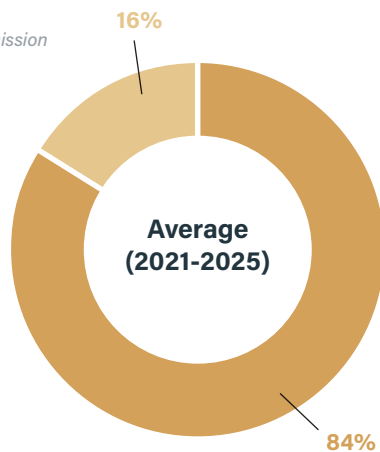


Average Exports of Canadian Wheat by Class

Source: Canadian Grain Commission

Class & Grade

- CWRS No. 2
- CWRS No. 1

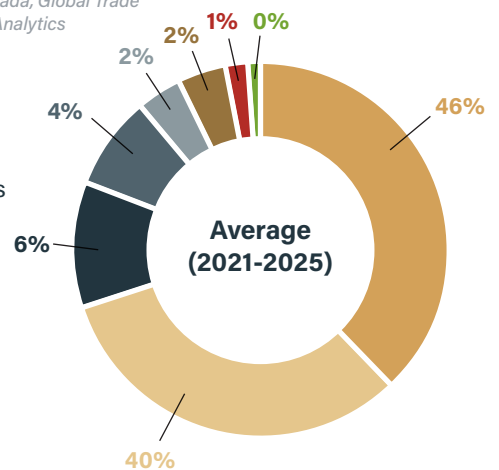


Wheat Imports by Origin

Sources: Statistics Canada, Global Trade Tracker, LSEG Data & Analytics

Exporter

- Australia
- United States
- Canada
- Brazil
- India
- Ukraine
- EU
- Others



Secondary Market The Philippines



Cereals Canada supports the Philippines through ongoing engagement with millers and targeted technical support aligned with the growing demand for high-quality baked goods.

As products such as cheese buns and garlic buns gain popularity, Cereals Canada works closely with the millers to strengthen understanding of Canadian wheat performance in bakery applications. Engagement with the Philippine Association of Flour Millers, Inc. (PAFMIL) has emphasized the value of technical support for the milling sector and collaboration with the bakery industry.



Cereals Canada also engages directly with buyers, millers, quality and procurement officers, through trade and technical missions, facility visits, seminars and webinars.



This support helps customers evaluate the reintegration of Canadian wheat into their supply chains by demonstrating its quality, consistency, and reliability, reinforcing Canada's position as a trusted supplier in the Philippine market.



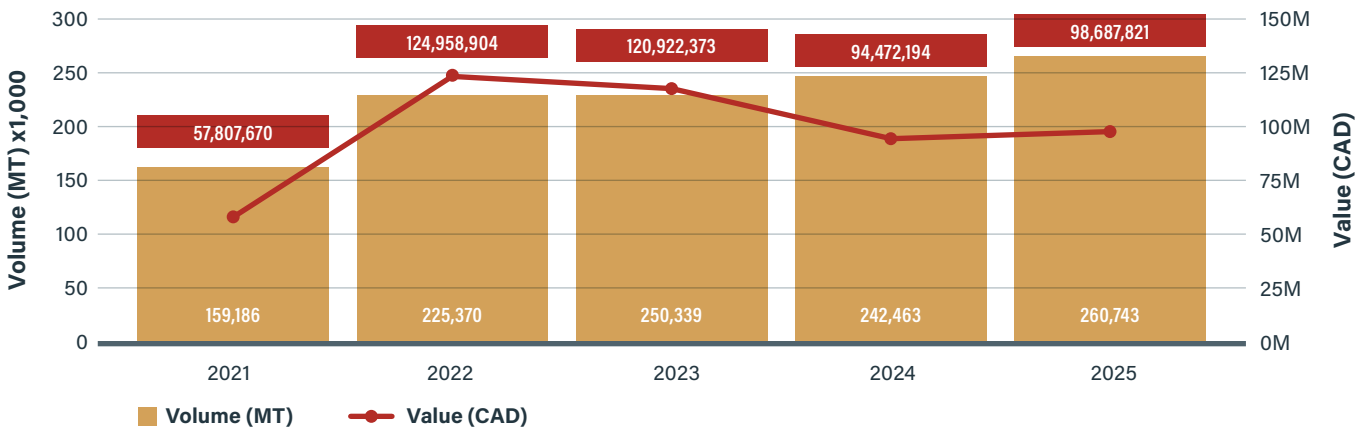
Secondary Market Thailand



Over the past five years, Thailand imported an average of 227,000 tonnes of Canadian non durum wheat annually. However, Australia and the United States dominated the market, supplying 40 percent and 23 percent of Thailand's non durum wheat imports, respectively, while Canada accounted for a smaller market share of 8 percent.

Exports of Canadian Non-Durum and Durum Wheat

Source: Statistics Canada

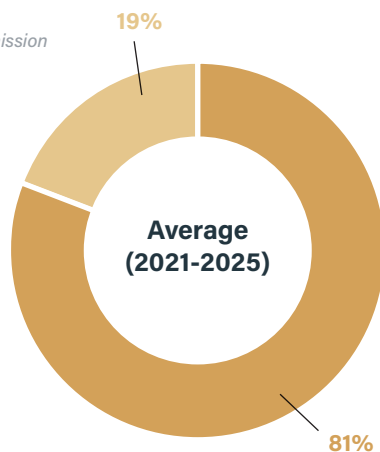


Average Exports of Canadian Wheat by Class

Source: Canadian Grain Commission

Class & Grade

- CWRS No. 2
- CWRS No. 1

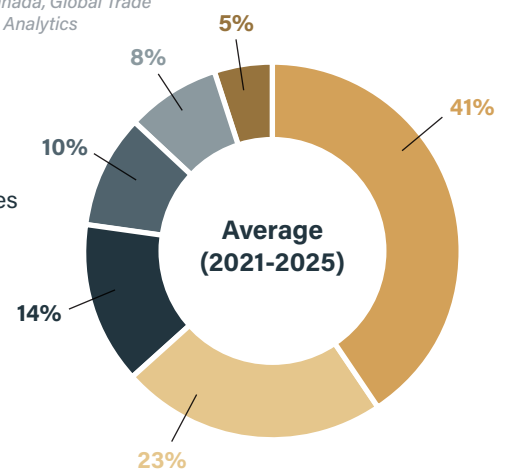


Wheat Imports by Origin

Sources: Statistics Canada, Global Trade Tracker, LSEG Data & Analytics

Exporter

- Australia
- United States
- EU
- Ukraine
- Canada
- Others



Secondary Market Thailand



Rising demand for milling wheat in Thailand is fueled by the recovery of the tourism sector and growing consumer demand for baked goods, one of the country's fastest-expanding retail segments.

The United States is the leading supplier of wheat to Thailand for bakery and biscuit production, followed by Canada.

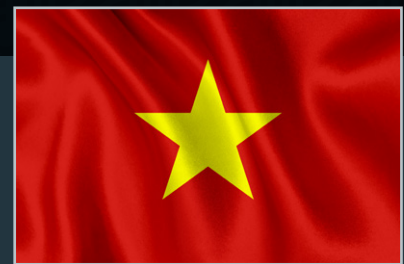


During the 2026 Indo Pacific Technical Mission, Cereals Canada met with millers from Kerry Flour Mills and Thai Flour Mill Industry Co. Both companies operate large mills in the region and purchase CWRS.

“Market diversification is important for Canadian wheat. While Thailand is a smaller market, we see value in understanding its market needs, strengthening relationships with millers, and providing technical support through targeted programming.”

—Leif Carlson, Vice President of Markets and Trade

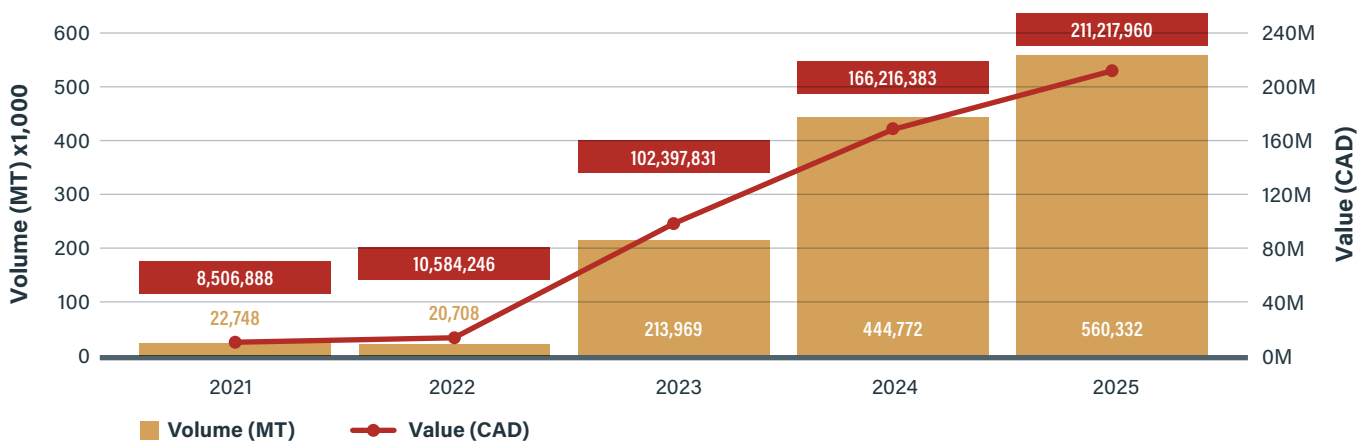
Emerging Market Vietnam



Over the last five years, Vietnam imported 251,000 tonnes of Canadian non-durum wheat per year, on average. Imports consisted primarily of grade 2 CWRS (75 percent), followed by grade 1 CWRS (20 percent) and wheat by specification (5 percent).

Exports of Canadian Non-Durum and Durum Wheat

Source: Statistics Canada

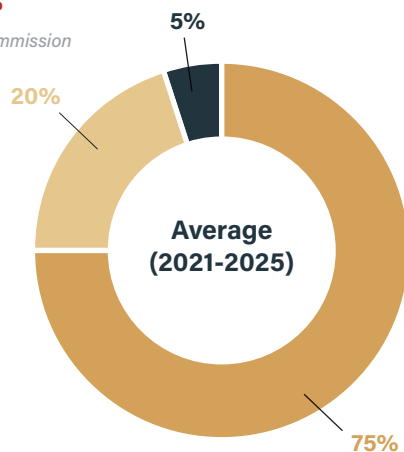


Average Exports of Canadian Wheat by Class

Source: Canadian Grain Commission

Class & Grade

- CWRS No. 2
- CWRS No. 1
- By Specification

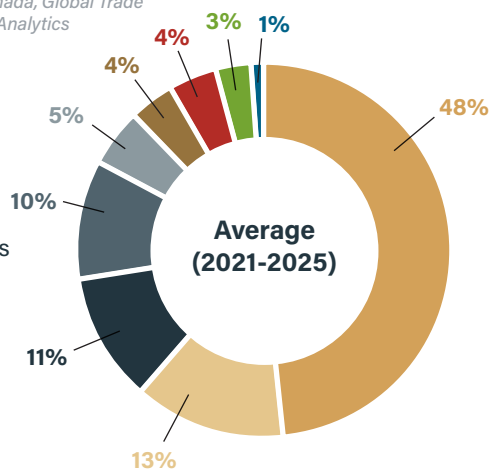


Wheat Imports by Origin

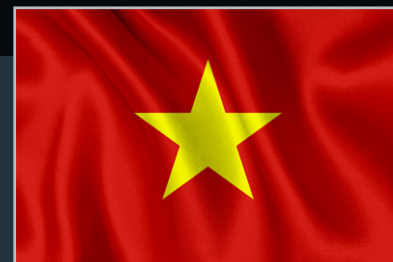
Sources: Statistics Canada, Global Trade Tracker, LSEG Data & Analytics

Exporter

- Australia
- Brazil
- Ukraine
- United States
- Canada
- EU
- Russia
- Argentina
- Others



Emerging Market Vietnam



Vietnam is one of the top global consumers of instant noodles and the bread segment is dominated by banh mi, a Vietnamese-styl

As an emerging market, Vietnam has potential for growth. Vietnam's consumption of wheat flour is expected to increase by 2.5 percent annually to reach 712,000 tonnes by 2029.

In early 2026, the Cereals Canada technical team, led by Elaine Sopiwnyk, embarked on the Indo-Pacific Technical mission and met with customers at the VimafLOUR, one of the larger mills in the country, to provide customer support for CWRS.



Market Access Issue: Canada Thistle

In 2019, Vietnam implemented phytosanitary restrictions on wheat from countries where Canada thistle can be found. As a result, Canadian exports of wheat to Vietnam decreased sharply in the following years.

Cereals Canada advocated for the removal of creeping thistle from its quarantine pest list and in September 2023, bulk shipments of Canadian cereals to Vietnam resumed. In 2024, Vietnam consumed 629,000 tonnes of wheat flour for use as a food ingredient.

Canada's reputation as a supplier of high quality cereal grains is increasingly being tested. As Canada exports to a wide range of markets, global buyers are implementing more complex regulatory standards, and market access is never guaranteed—as we have seen in regions such as ASEAN. We must ensure that our policies remain science based so Canadian cereals can continue to reach the markets that rely on them.”

— Krista Zuzak, Director of Crop Protection and Production

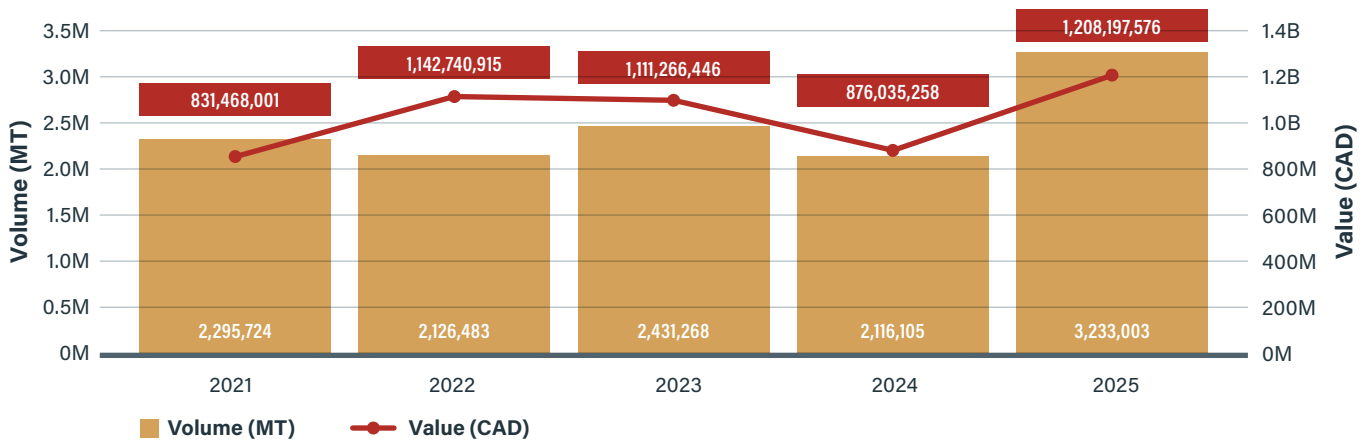
Core Market/Emerging Market (Durum) China



China is the largest export destination for Canadian non-durum wheat, with average exports of 2.4 million tonnes annually over the past five years. While the Chinese pasta market remains small compared to the rice and noodle markets, it is expanding rapidly. As of 2023, the pasta segment was forecast to grow at an annual rate of 11.9 percent between 2022 and 2027, presenting a growing opportunity for Canadian durum wheat.

Exports of Canadian Non-Durum and Durum Wheat

Source: Statistics Canada

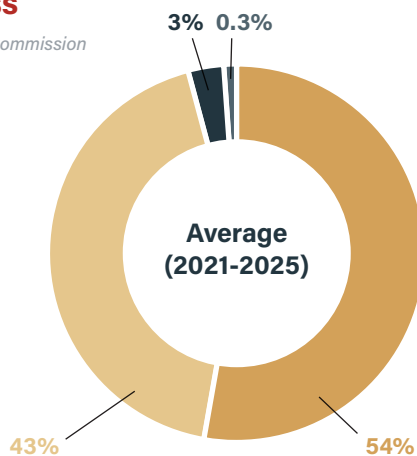


Average Exports of Canadian Wheat by Class

Source: Canadian Grain Commission

Class & Grade

- CWRS No. 2
- CWRS No. 1
- Other
- CWAD No. 1

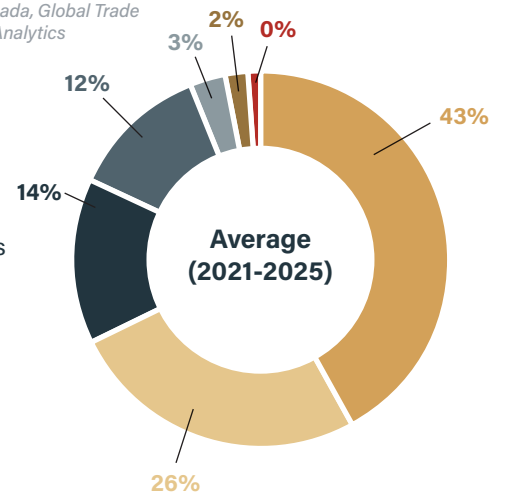


Wheat Imports by Origin

Sources: Statistics Canada, Global Trade Tracker, LSEG Data & Analytics

Exporter

- Australia
- Canada
- United States
- EU
- Kazakhstan
- Russia
- Others



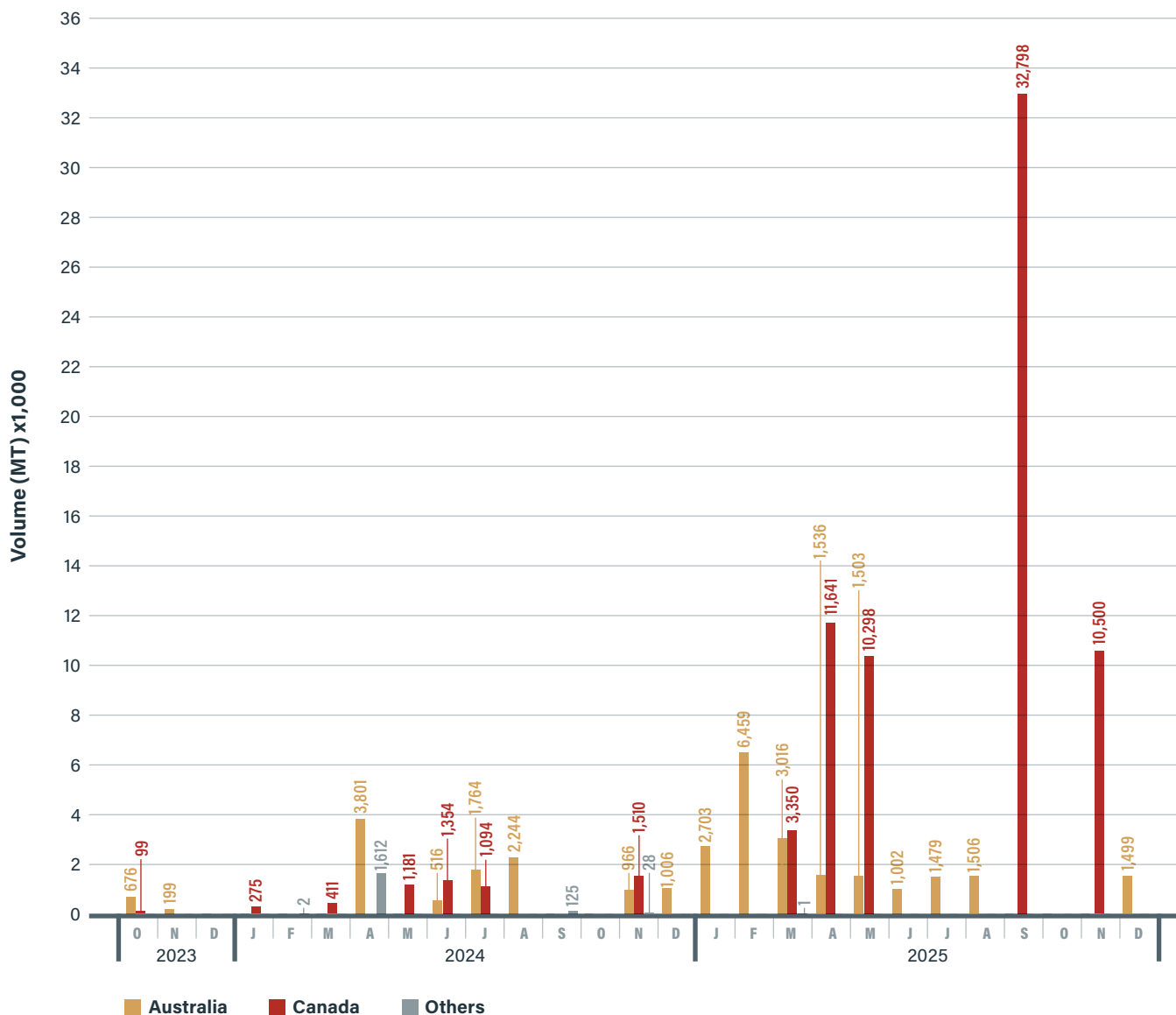
Core Market/Emerging Market (Durum) China



In 2025, Canada supplied 69,000 tonnes of CWAD to China, accounting for 77 percent of China's total durum wheat imports during this period. Canada competes with Australian durum wheat in the Chinese market.

Exports of Durum Wheat to China, by Exporter

Sources: Statistics Canada, Global Trade Tracker



Core Market/Emerging Market (Durum) China



China is an important core market for CWRS and is also an emerging market for CWAD. CWRS offers a balance of strength and extensibility that results in preferred quality characteristics for end products, such as a soft and airy crumb structure in bread. CWAD is recognized for its superior colour, semolina yields, and high protein content.

Imported pasta remains popular in China due to strong brand recognition and its perceived premium quality, although domestic pasta production is growing. Engagement from the Cereals Canada team emphasized that high-quality pasta products can be made domestically with CWAD.

Discussions with COFCO took place during the 2023 New Crop Trade and Technical Missions, where opportunities to use CWAD in pasta production were explored. As a result, COFCO imported CWAD for the first time in November 2023. This led to the COFCO Durum Technical Exchange Program, held at the Cereals Canada facilities in August 2024. During the exchange, technical experts highlighted the advantages of Canadian wheat through hands-on demonstrations in the analytical and pasta labs and the mill.



In May 2025, COFCO completed its first bulk import of Canadian durum. A press release by COFCO stated that Canadian durum wheat is valued globally because of its “fine colour and high flour yield.”

A follow-up mission was held in 2025 to strengthen engagement. In September, the Cereals Canada technical team traveled to China to meet with millers and pasta manufacturers. With support from COFCO, the team visited mills in several cities to gain insight into local processing methods and market preferences. Product samples made with Canadian durum wheat were shared, and presentations were delivered on milling optimization; evaluation of wheat, semolina, and pasta quality; and the processing of CWAD and blended products.



“Our targeted engagement with Chinese customers consistently drives home the point that premium pasta products are made with CWAD.”

— Elaine Sopiwnyk, vice president of technical services.



Cereals Canada the Leading Voice of Canadian Cereals

Cereals Canada is the national, not-for-profit, industry association representing the Canadian cereal grains value chain.

Our vision is clear and bold: Canada will be the world's preferred choice for quality cereals and trusted relationships.

We build and strengthen relationships across government, industry, and global buyers to provide timely, expert technical information and deliver best-in-class customer experience.

Supported by a value chain that is resilient, innovative, and responsive to change, we unite Canada's cereals sector to compete, lead, and thrive globally.

We deliver impact by protecting trade, fostering innovation, growing and maintaining markets, and providing world-class expertise that ensures Canadian cereals remain the world's top choice.

There is no other place in Canada that is equipped and staffed with the experts to do this type of testing, all under one roof.

Cereals Canada Facilities

Cereals Canada is a trusted independent source of technical support to customers and others in the cereals value chain.

We support our members and others in the cereals value chain with six technical laboratories located in our downtown Winnipeg headquarters, including a pilot mill, an analytical lab, end-products areas (baking, pasta, Asian products), and a specialty milling facility.

By leveraging the technical facility and our international engagement effectively, the Canadian value chain can assert our presence in global markets, differentiate our products, and secure our position as preferred suppliers, ensuring the continued prosperity of the entire value chain.

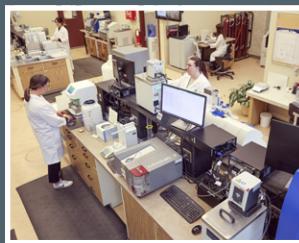
We deliver impact by protecting trade, fostering innovation, growing and maintaining markets, and providing world-class expertise that ensures Canadian cereals remain the world's top choice.

Learn more about our labs:

Flour & Semolina Milling



Analytical Services



End-products: Baking



End-products: Pasta & Asian Products



Take a virtual tour of our facilities here:

[Welcome to Cereals Canada](#)

