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2026 Annual Meeting

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March 15-17, 2026

The Westin Savannah Harbor • Savannah, Georgia



2026 Durum Outlook



Jim Peterson
Executive Director
ND Wheat Commission
March 16, 2026



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World Durum

- **World durum supply and demand variables in comfortable situation currently**
- **Second straight year of production rebound**
- **Increased production in traditional import countries as well**
 - **Reduced world trade opportunities**
 - **Stable price environment**
 - **End of marketing year carryover inventories will provide a supply cushion in early 26**
- **Durum food use projected at record high world wide. Increasing demand in some new regions, and strong demand for “durum” pasta**
- **Durum still holds a premium in price to “soft” wheat in most markets, but premium has narrowed. Recent strength in wheat prices in past few weeks has been in non-durum wheat classes, and other commodities. Will durum prices begin to follow?**



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World Durum

➤ Recent trends of note in world durum dynamics

- Increasing durum production in some Eastern European countries, as well as Russia
- Turkey has shifted back to strong importer of durum, after being a large “net” exporter in 2023 and 2024. Smaller domestic crops and robust domestic pasta processing driving imports.
- Mexico has shifted to strong importer of durum in 2025 due to significant drought conditions

➤ 2026 outlook

- Expect contraction in durum planted area in many countries. Lower returns to producers.
- Currently, mostly favorable soil moisture conditions, but some dryness in parts of southern Europe and North Africa. Mexico situation seems improved over recent years.
- Canadian and U.S. durum regions are OK for soil moisture, but well below average snow this winter



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World Durum

- **2026 variable that will impact current stable supply situation**
 - **Weather....drought and adverse harvest weather hard to predict**
 - **Geopolitical uncertainties**
 - **Inflationary pressures on fuel, labor, transportation and within other commodities**
 - **Overall wheat product consumption - weight loss drugs, MAHA objectives and actions, consumer economics**
- **Would anticipate durum demand to outpace production in the upcoming year**
- **Will shift dynamics from being “heavy” on the supply side to “tighter, but still comfortable” situation, dependent on normal growing season and harvest conditions**
- **Large wildcards?**
 - **Geopolitical situation**
 - **Price trends in competing commodities**



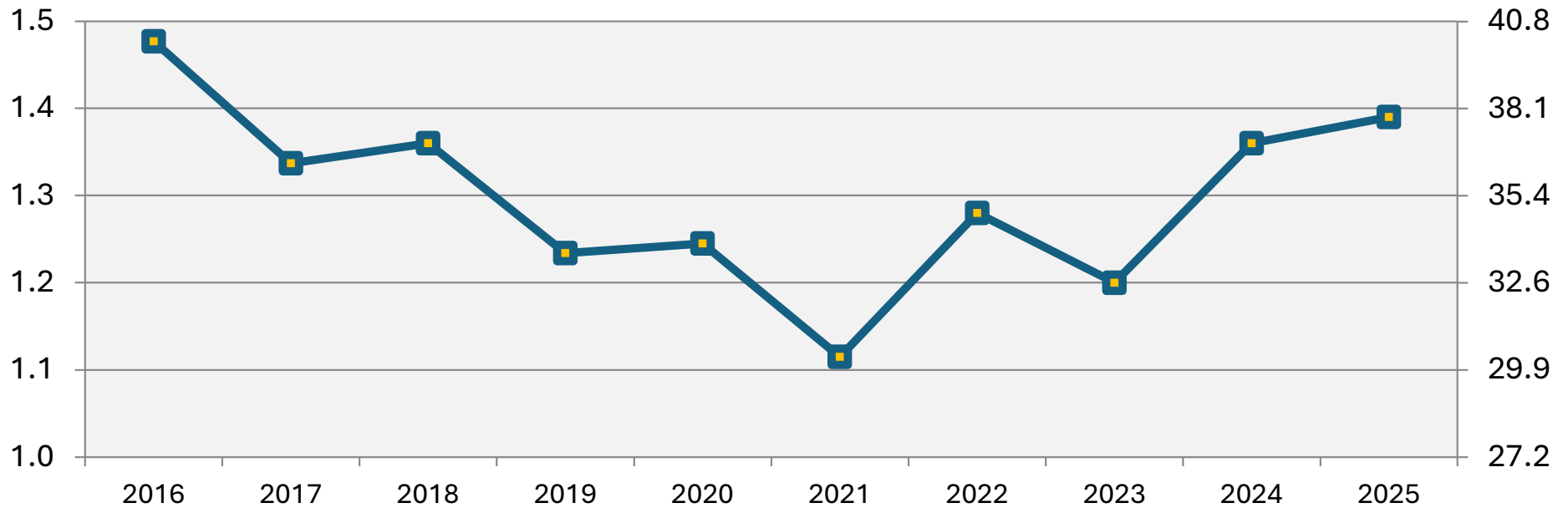
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World Durum Production

Billion Bushels

Million Metric Tons



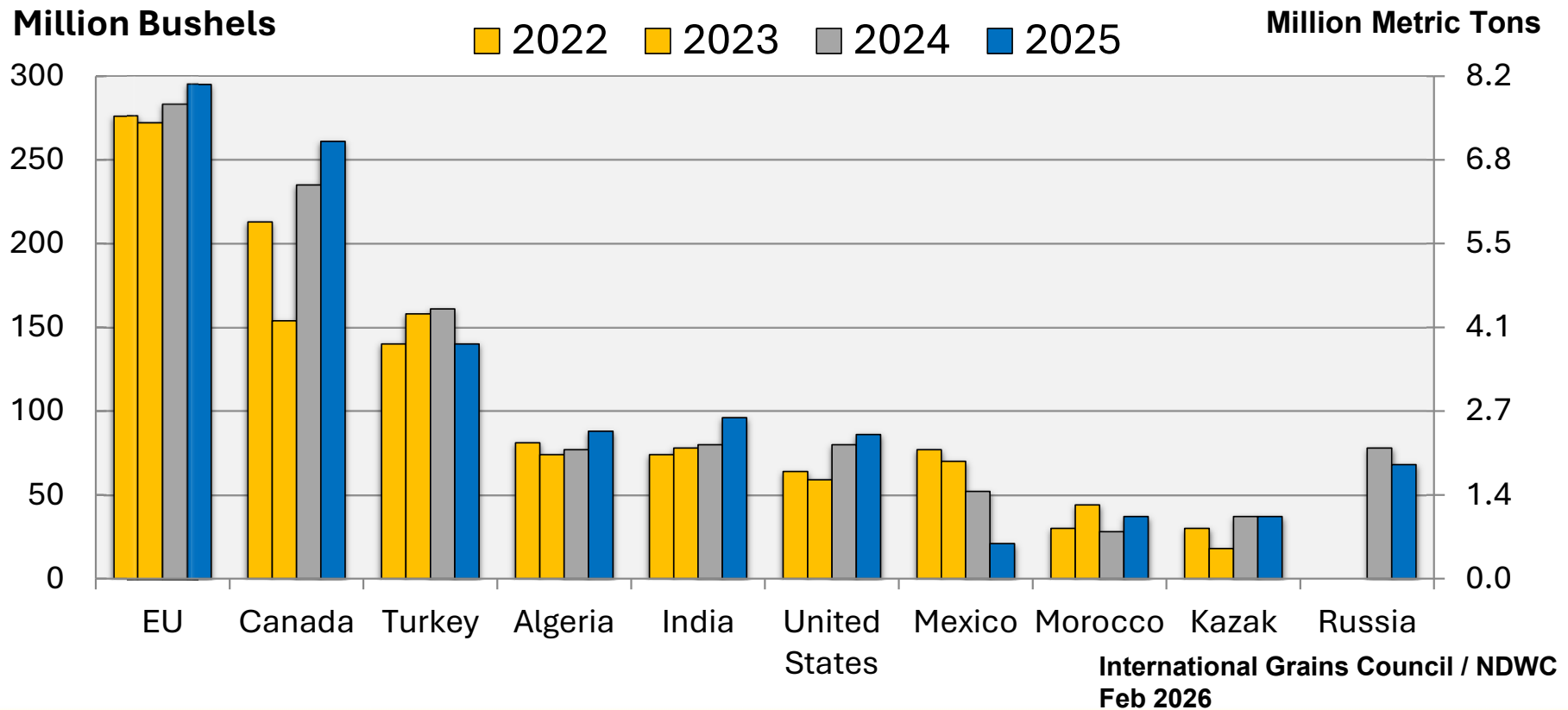
Source: Int'l Grains Council Feb 2026
2026 - NDWC



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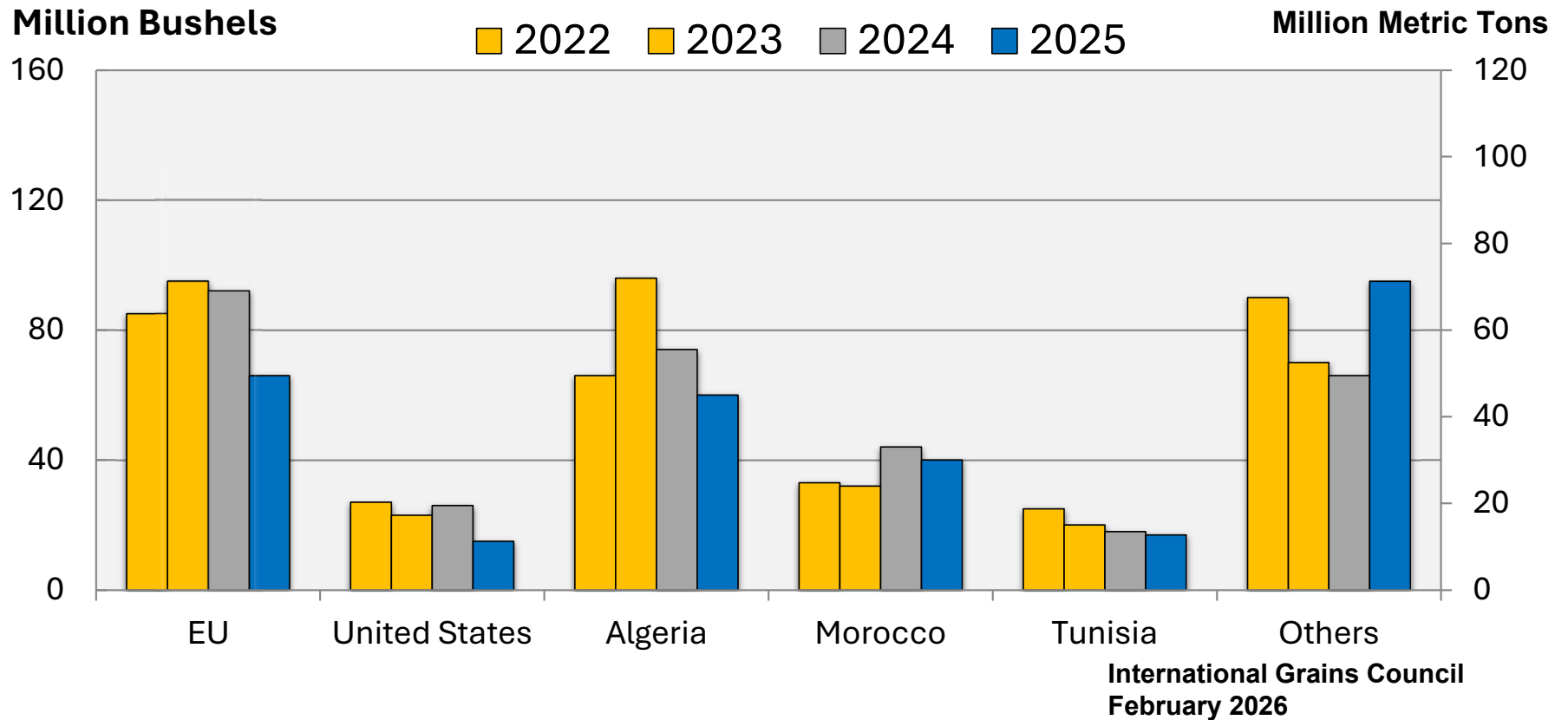
World Durum Production



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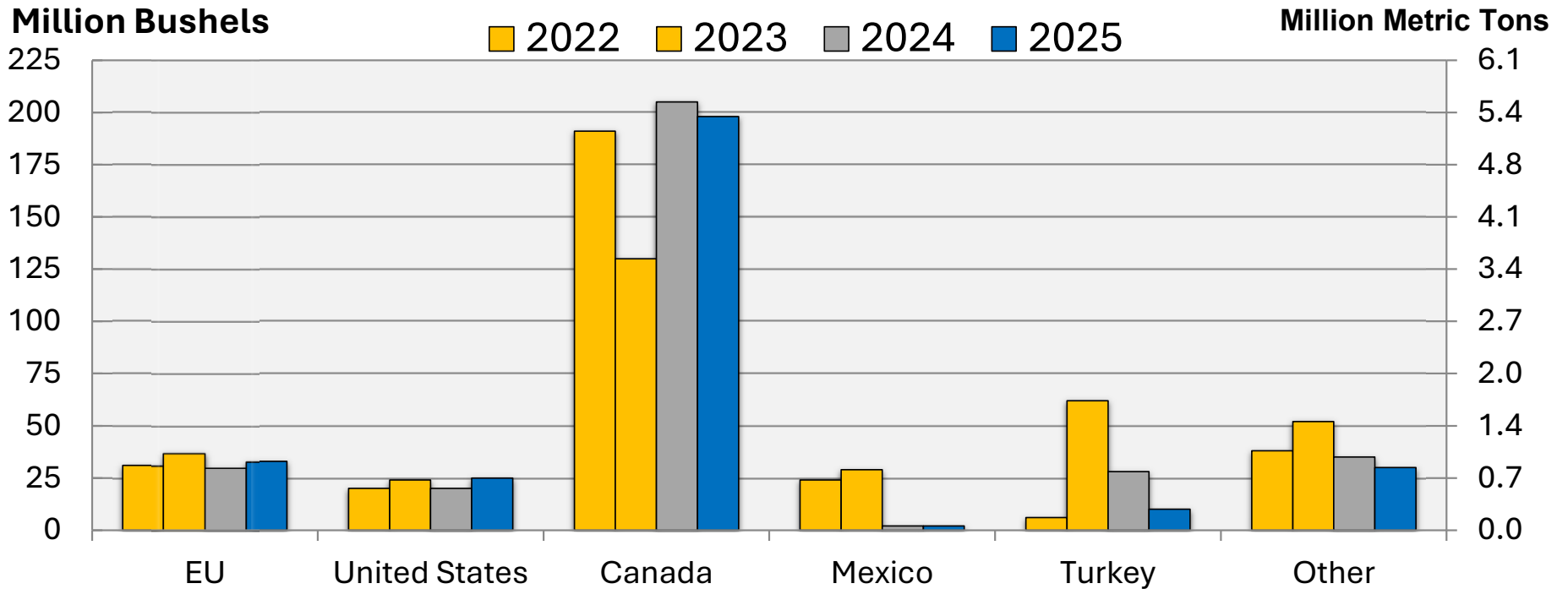
World Durum Imports



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World Durum Wheat Exports



International Grains Council
Feb 2026



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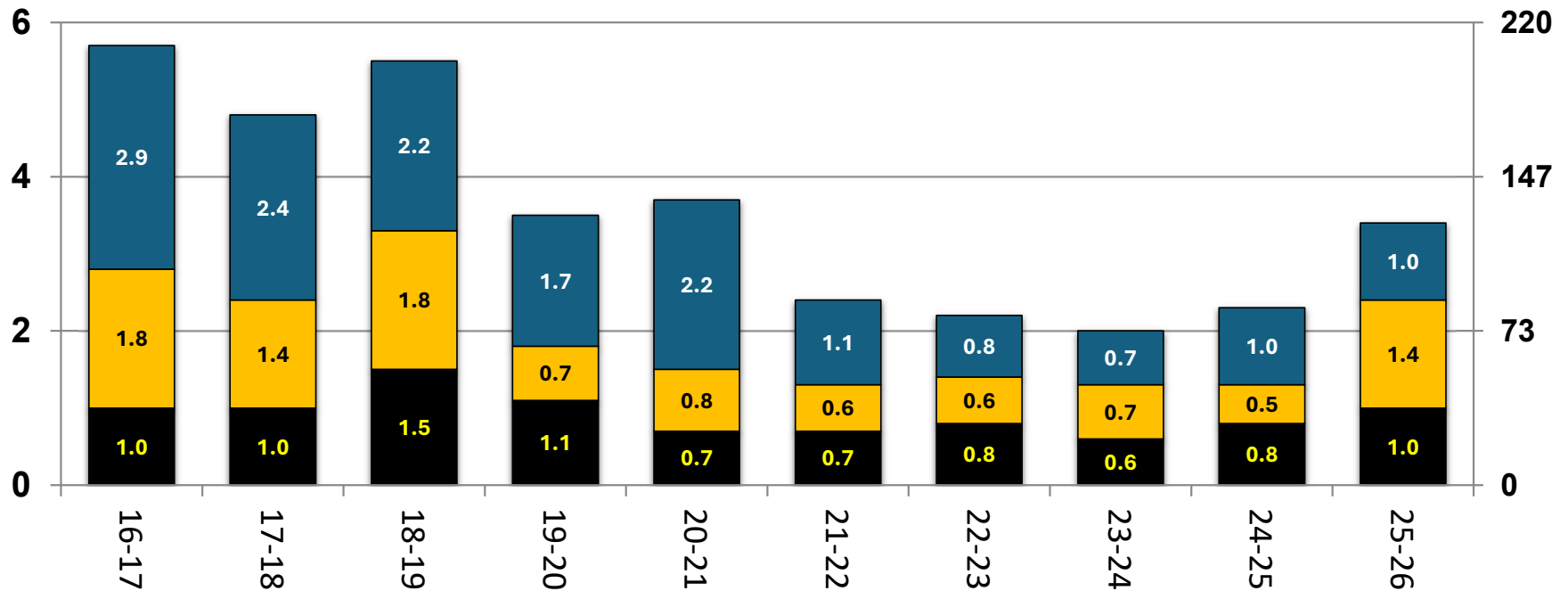
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End of Year Stocks (July-June)

Million Tons

Million Bushels

■ U.S. ■ Canada ■ EU



Source: Int'l Grains Council -- Feb 2026



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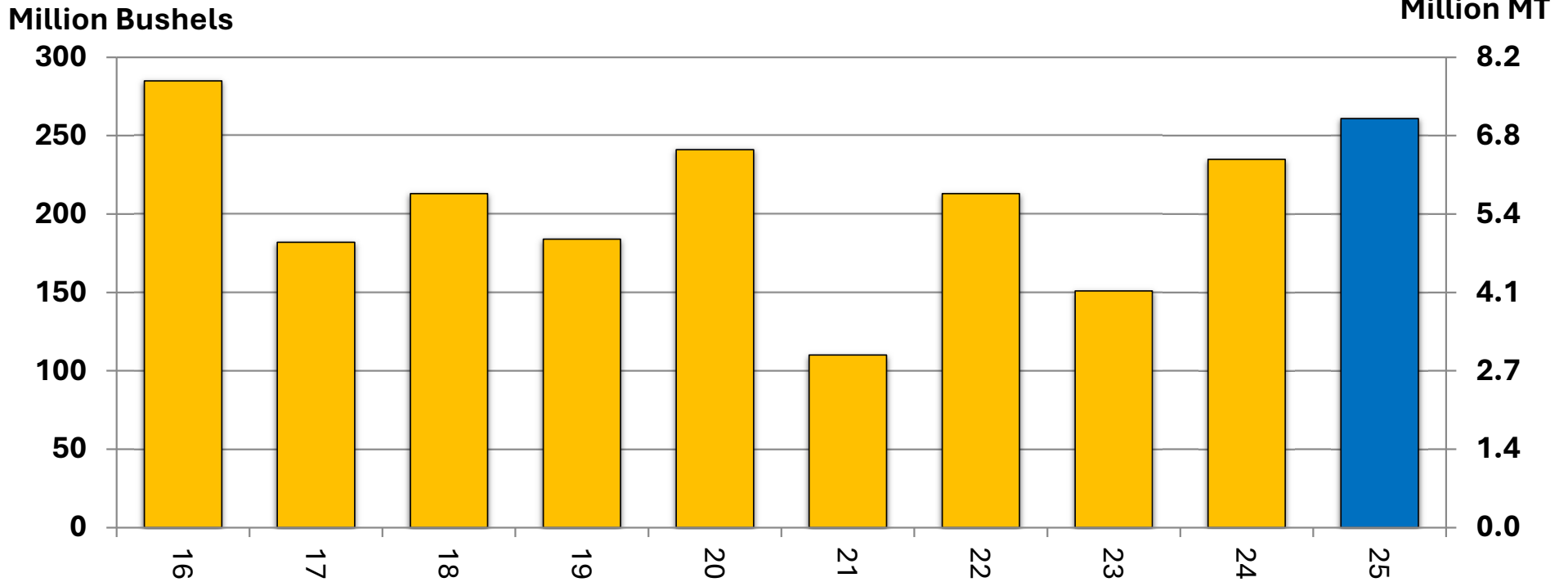
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Canadian Durum

- Very strong production in 2025, higher planted area and above average yields.
- Generally good quality crop, but some adverse harvest weather impacts on quality.
- Exports through January are 7% lower than previous year. Nearly two-thirds of exports have been to Algeria, Morocco and Italy.
- Export sales to the U.S. are down 34% from the previous year as uncertainty over tariffs has slowed sales.
- End of year inventories projected to be 2.5X larger than a year ago, and largest in 7 years.
- 2026 planted area for durum estimated to be down 2-3% from last year. Stable in Saskatchewan, but down in Alberta. Survey prior to Iran conflict.

CANADIAN DURUM PRODUCTION



Source: Ag Canada
Dec 2025



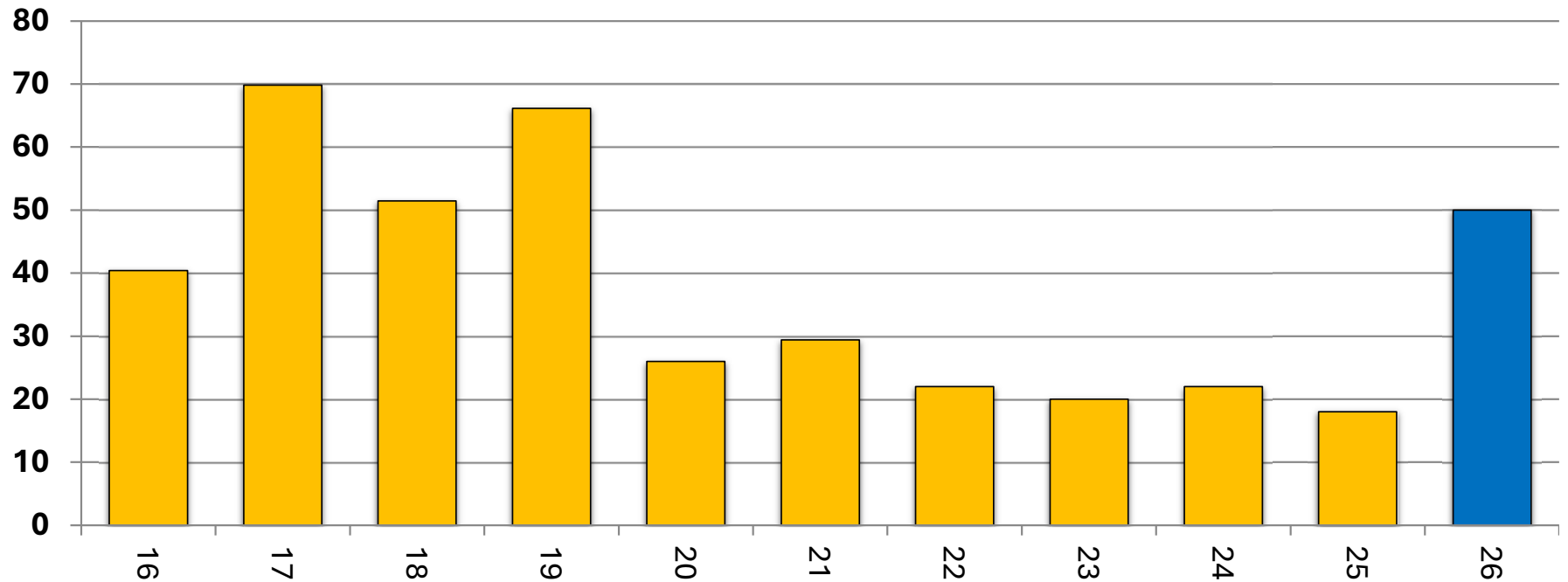
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CANADIAN DURUM

End of Year Stocks – As of July 31

Million Bushels



Source: IGC

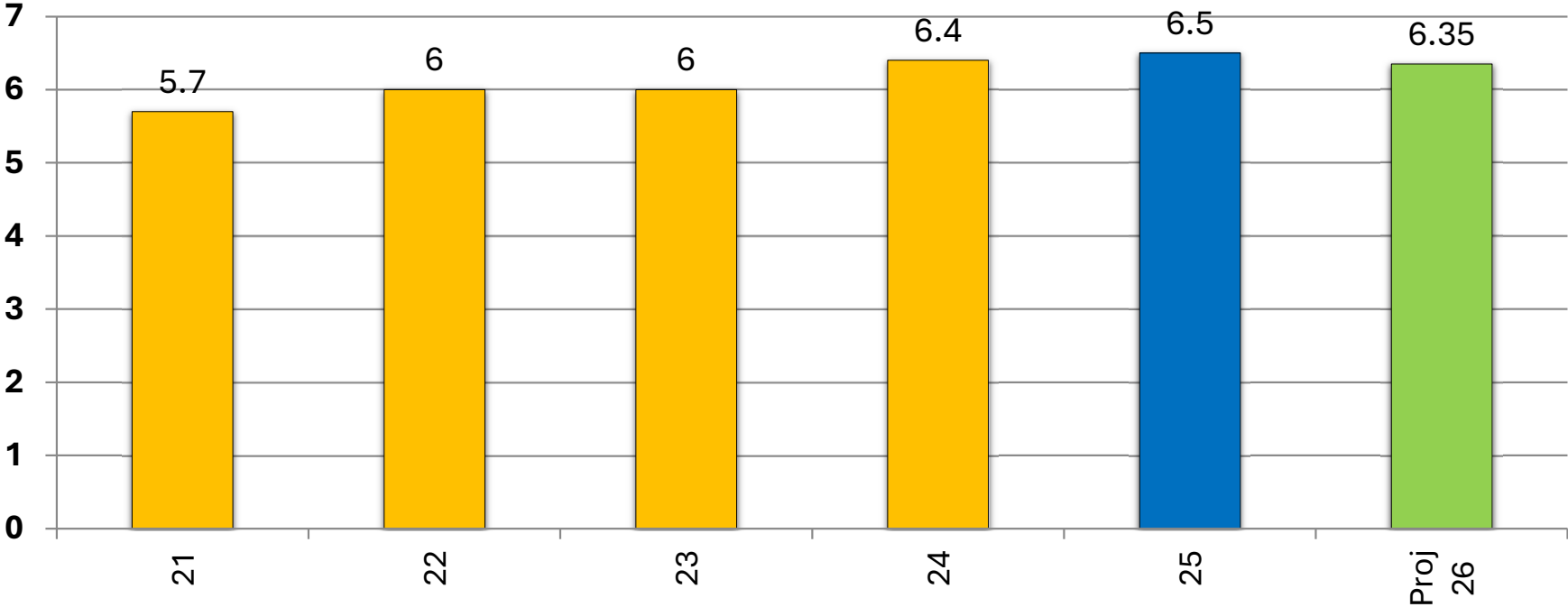


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CANADIAN DURUM PLANTED AREA

Million Acres



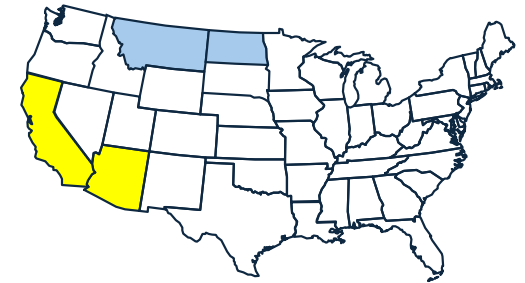
Source: Ag Canada / Stats Canada – March 2026



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U.S. Durum Regions



- **Production regions**
 - **Northern Durum - North Dakota and Montana – 90% of U.S. production**
 - **Desert Durum - California and Arizona**
- **Northern durum planted in April-June, harvested in August-September**
- **Desert Durum planted in Nov-January, harvested in June**
- **All Northern durum is dryland production, Desert is all irrigated**



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U.S. Durum Dynamics in 2025

- **Increase in planted area, especially in MT and ND**
 - Favorable price premium to hard red spring wheat, and durum competitive with other crop options
 - Drought in parts of MT impacted yields and production for producers
 - Generally good quality, although some adverse harvest weather
 - Desert Durum region continues to face high water costs and some restrictions, keeping production below average
- **Demand**
 - Still strong domestic food use of durum, although down from record levels
 - Exports in 2025 and early 2026 are up 75% from previous year
 - Strong demand into Mexico to fill shortfalls with their crop
 - Italy, Algeria, Nigeria, Haiti and Venezuela also strong markets. In EU, imports needed to boost protein levels
 - U.S. is positioning more exports out of Texas Gulf versus Duluth

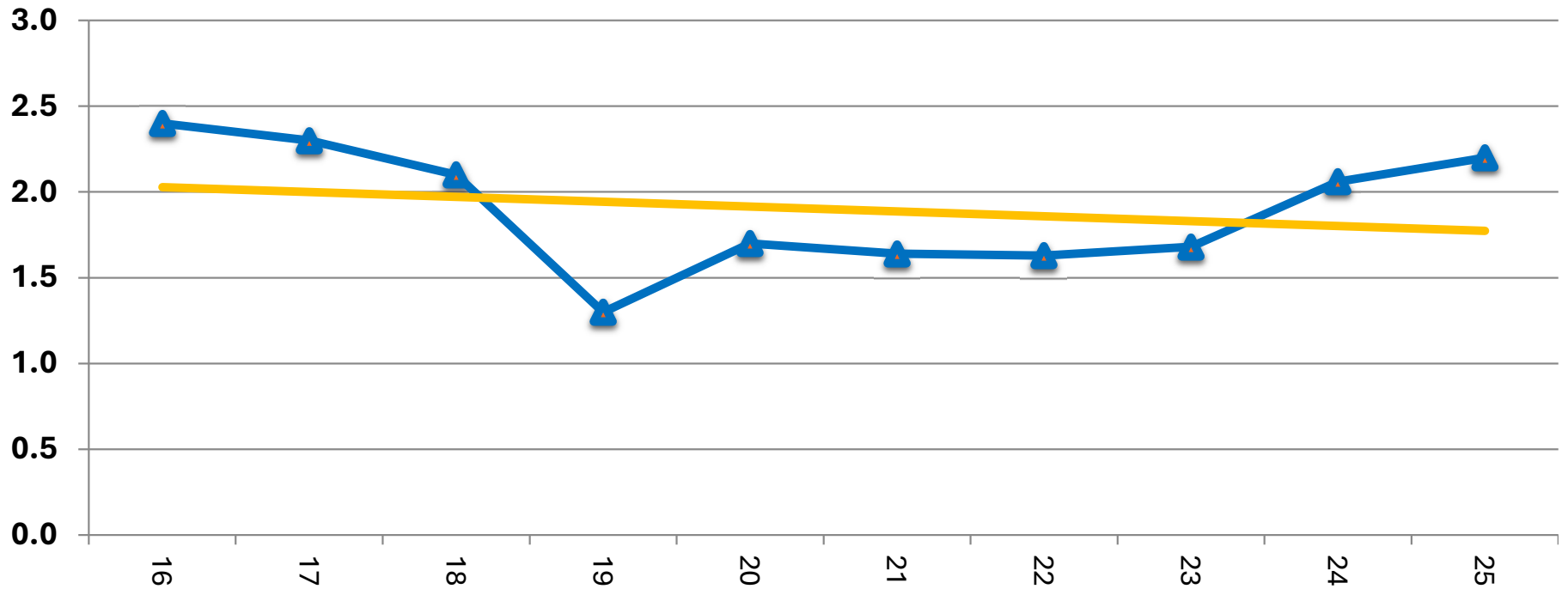


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U.S. DURUM WHEAT PLANTED AREA

Million Acres



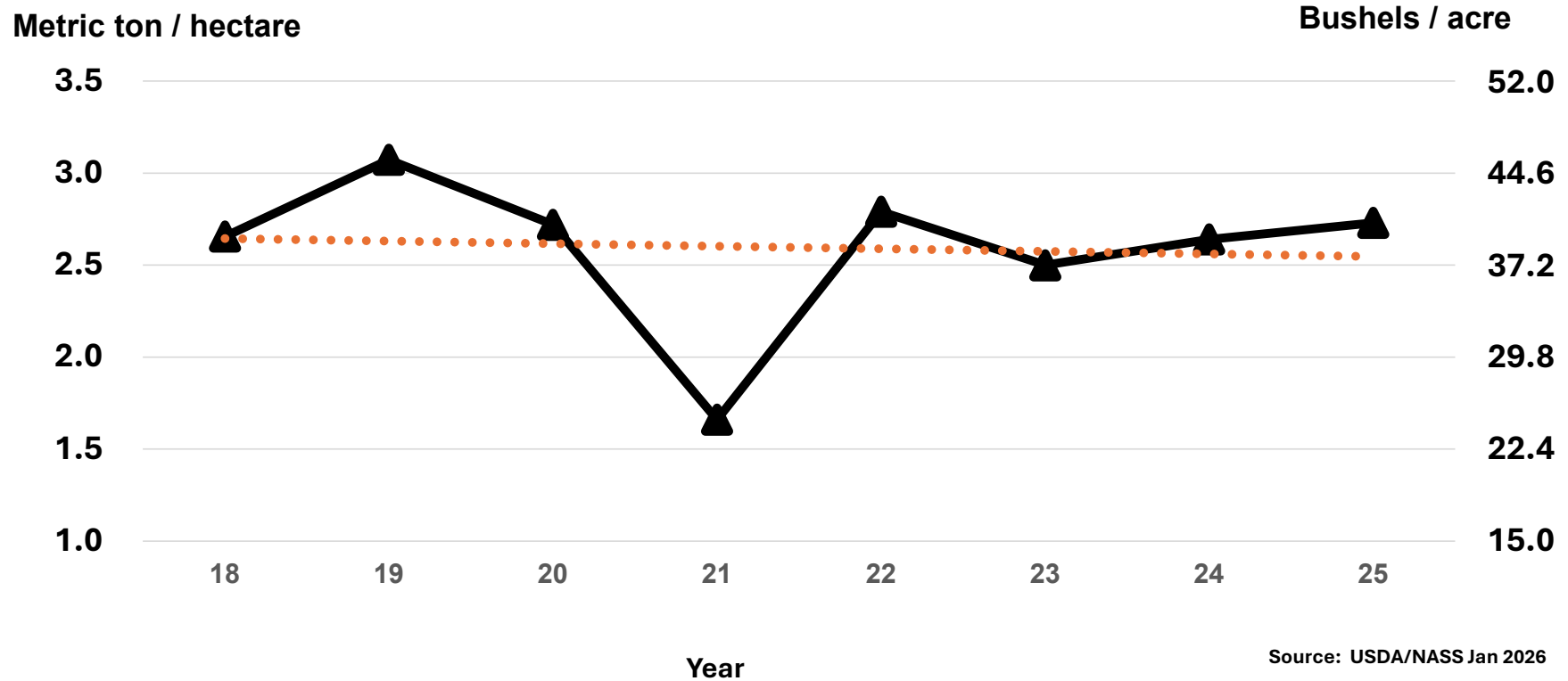
Source: USDA / NDWC



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U.S. DURUM YIELD



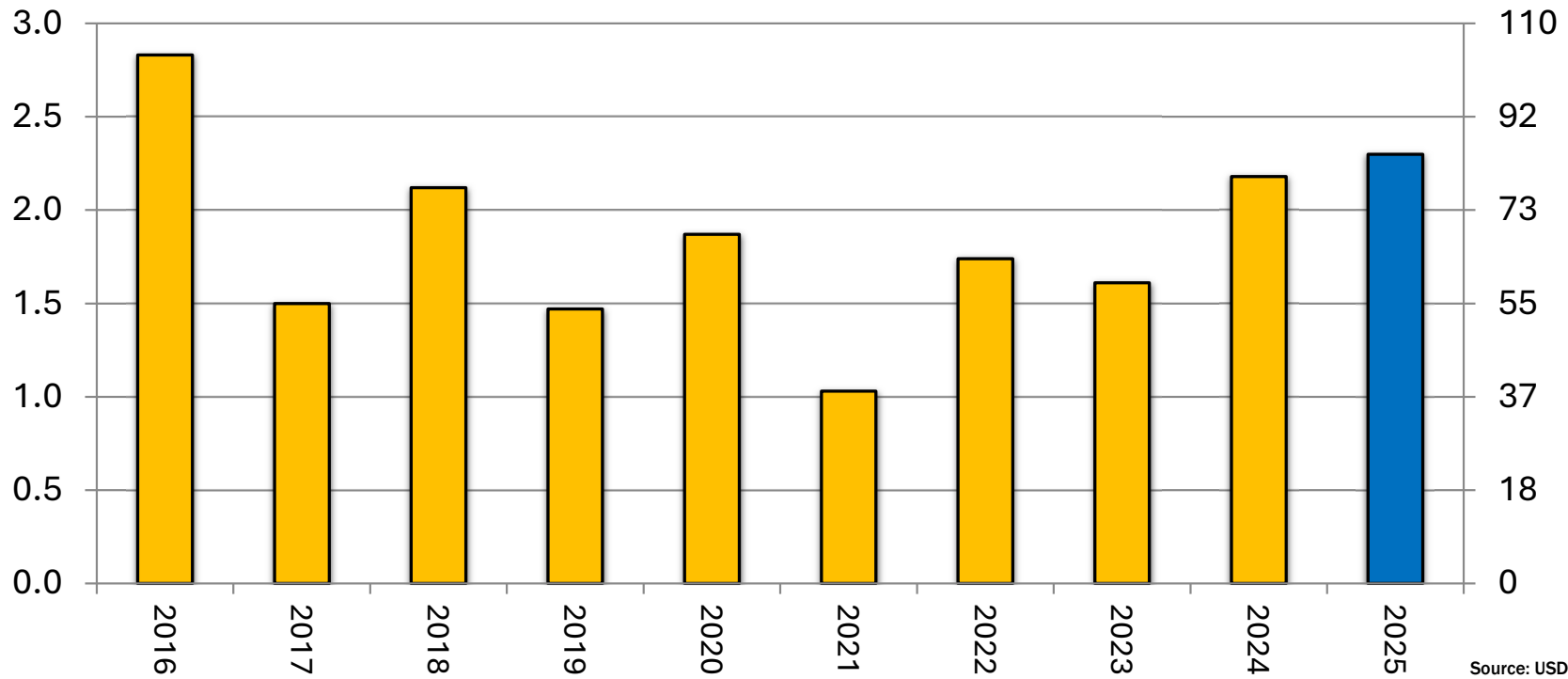
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U.S. DURUM PRODUCTION

Million Tons

Million Bushels



Source: USDA Jan 2026

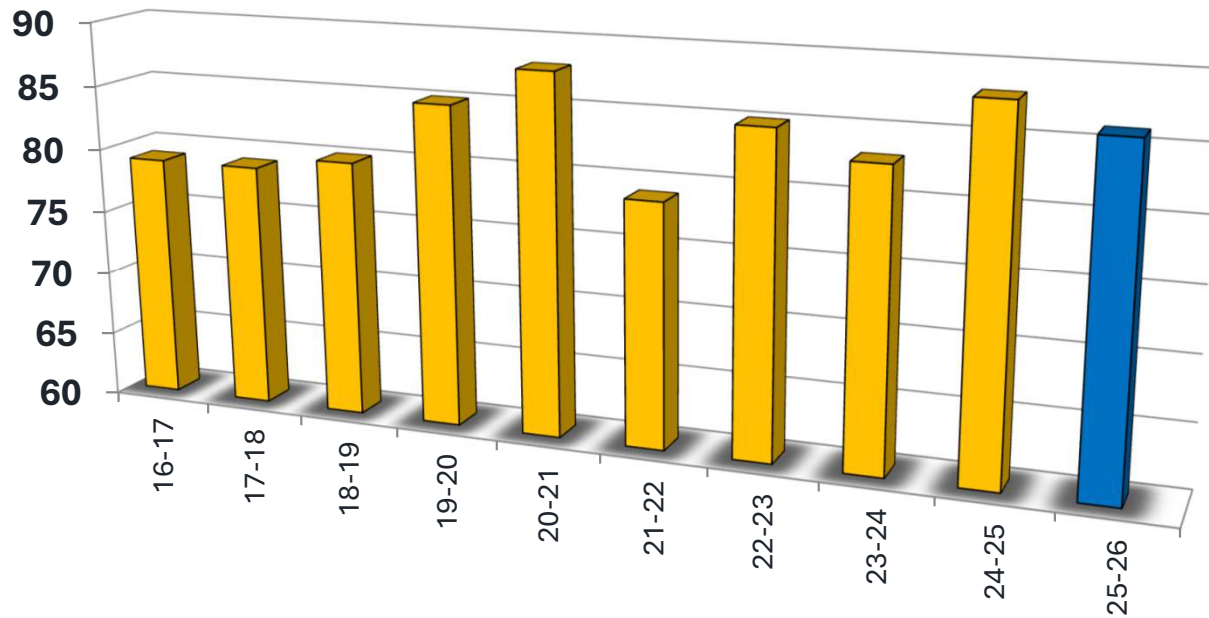


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U.S. FOOD USE OF DURUM

Million Bushels



Source: USDA Feb 2026

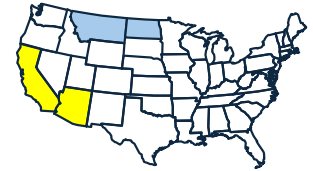


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U.S. Durum 2026 Outlook



- **Desert Durum planted area estimated up 15% from fall of 2024, based on January 2026 survey. Caution...only 3% of total U.S. durum acres. Still below typical average for region.**
- **Early expectations in MT and ND are for mostly steady acres, within 2-3% of either side of 2025 plantings.**
- **Challenging economic returns for many crop options, but durum will compete similar to a year ago in key production regions.**
- **Crop rotations are a very important practice for producers in ND and MT.**
 - **Benefits in soil health, disease management, labor and machinery optimization, and cost management. This limits the level of year-to-year shifts in crops.**

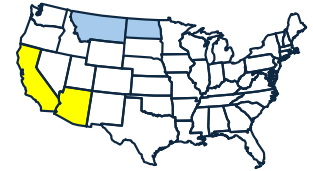


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U.S. Durum 2026 Outlook



- **Largest recent wild card is Iran conflict and sharp rise in fertilizer prices. Durum and HRS wheat require higher level of nitrogen fertilizer compared to some other crops.**
- **The recent increase in prices for non-durum wheat will be an important variable to watch. If continued gains in hard red spring wheat, and other crop options prior to late April, could see some switch from durum.**
- **An early planting season generally favors wheat across western North Dakota and into Montana.**
- **USDA will release the 2026 Planting Intentions survey on March 31.**



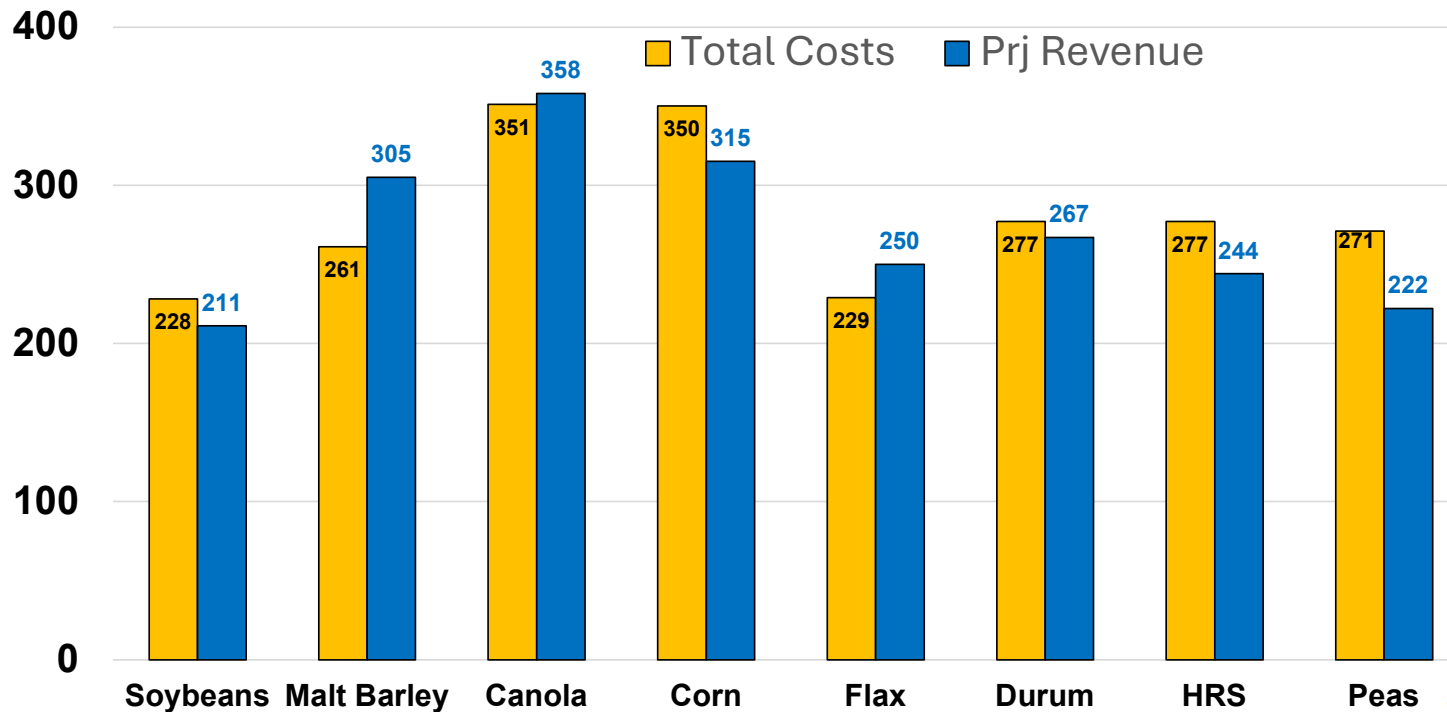
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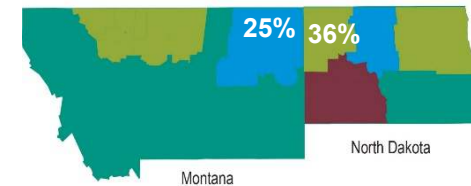
Projected Crop Budgets - 2026

Northwest North Dakota Avg

\$ Per Acre



Approximate Share of Annual Durum Production



*Malt Barley -Need to have contract, and must make quality specs, otherwise feed.

These budgets prior to Iran conflict, so Fertilizer and Fuel higher

Source: NDSU / NDWC Feb 2026



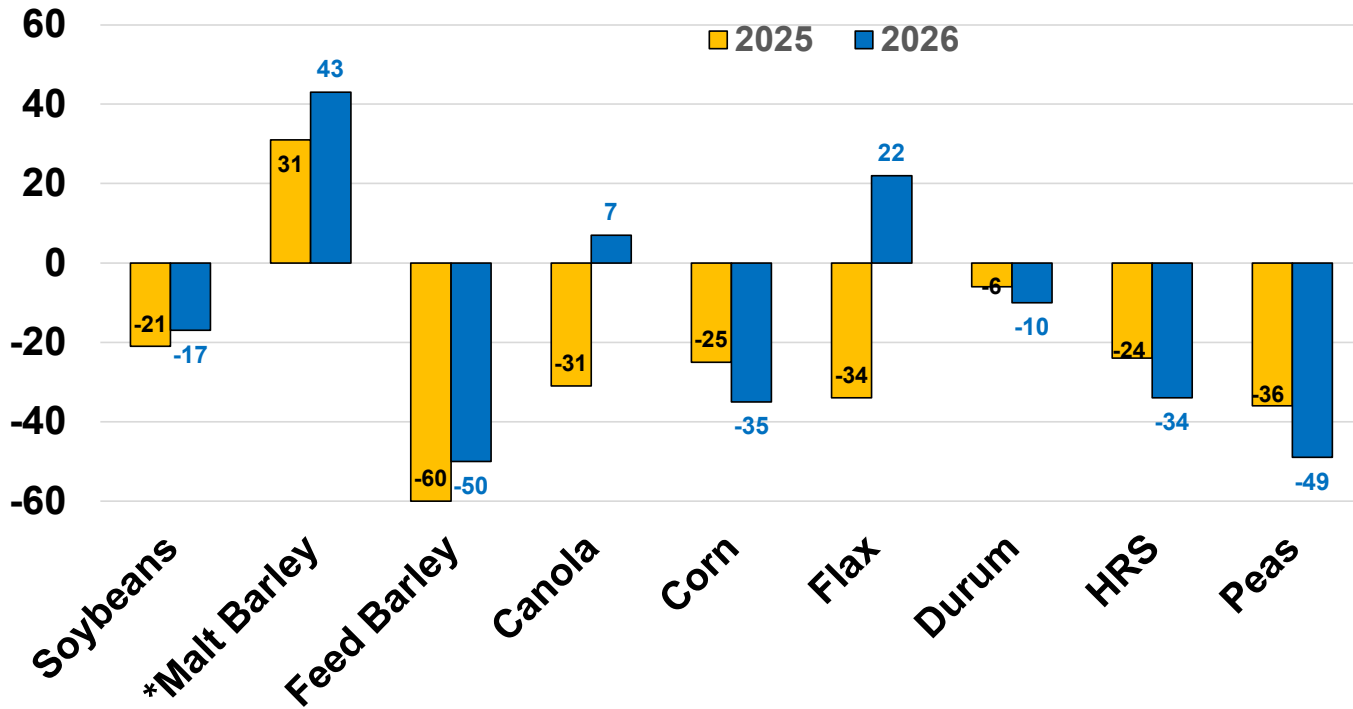
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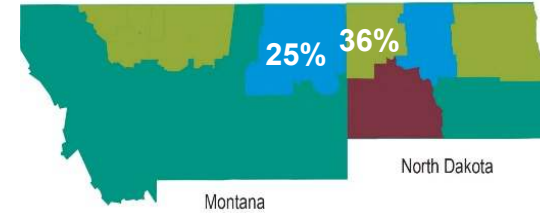
Projected Crop Budgets Northwest North Dakota Avg

Approximate Returns over Variable and Fixed costs

\$ Per Acre



Approximate Share of Annual Durum Production



*Malt Barley -Need to have contract, and must make quality specs, otherwise feed.

These budgets prior to Iran conflict, so Fertilizer and Fuel higher

Source: NDSU / NDWC Feb 2026



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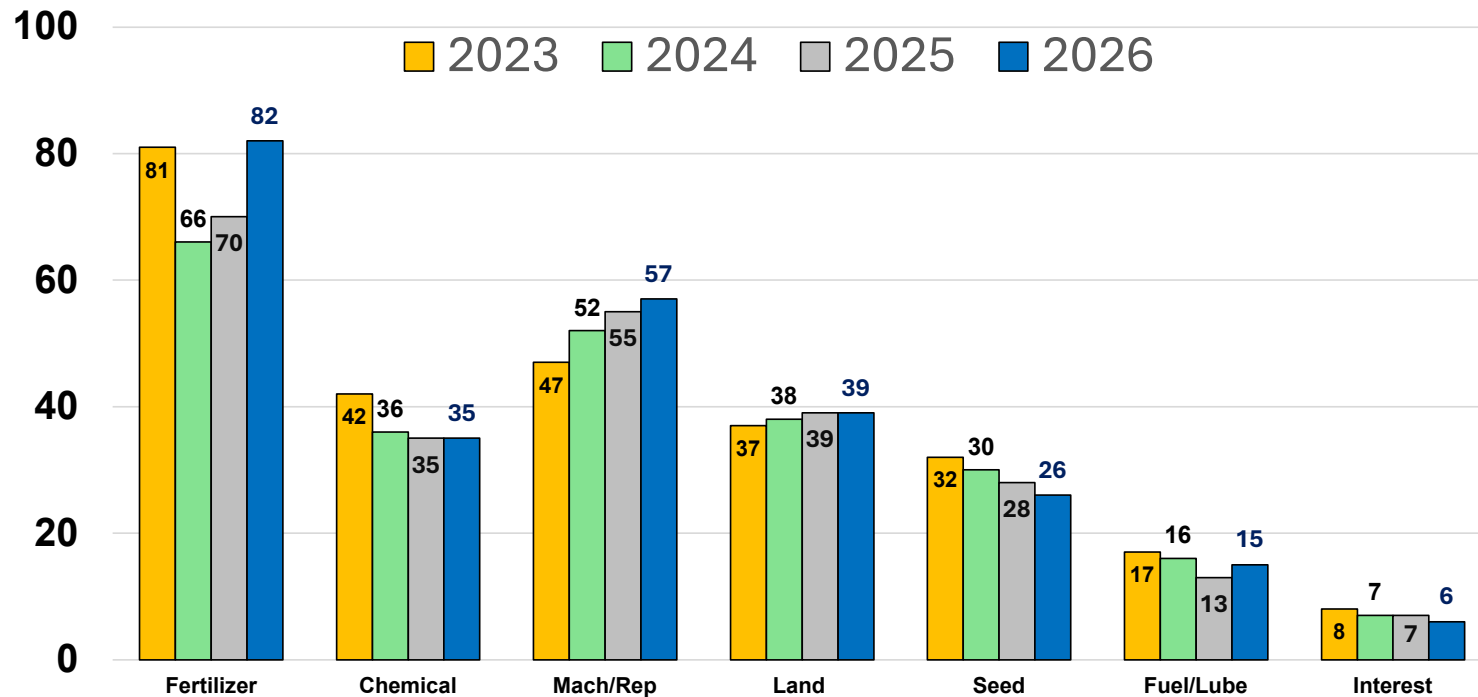
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Production Cost Trends

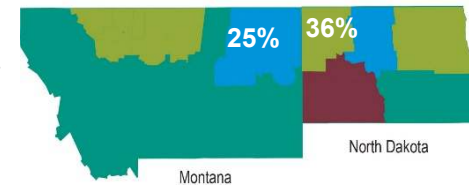
Northwest North Dakota Avg

Total Production Costs

\$ Per Acre



Approximate Share of Annual Durum Production



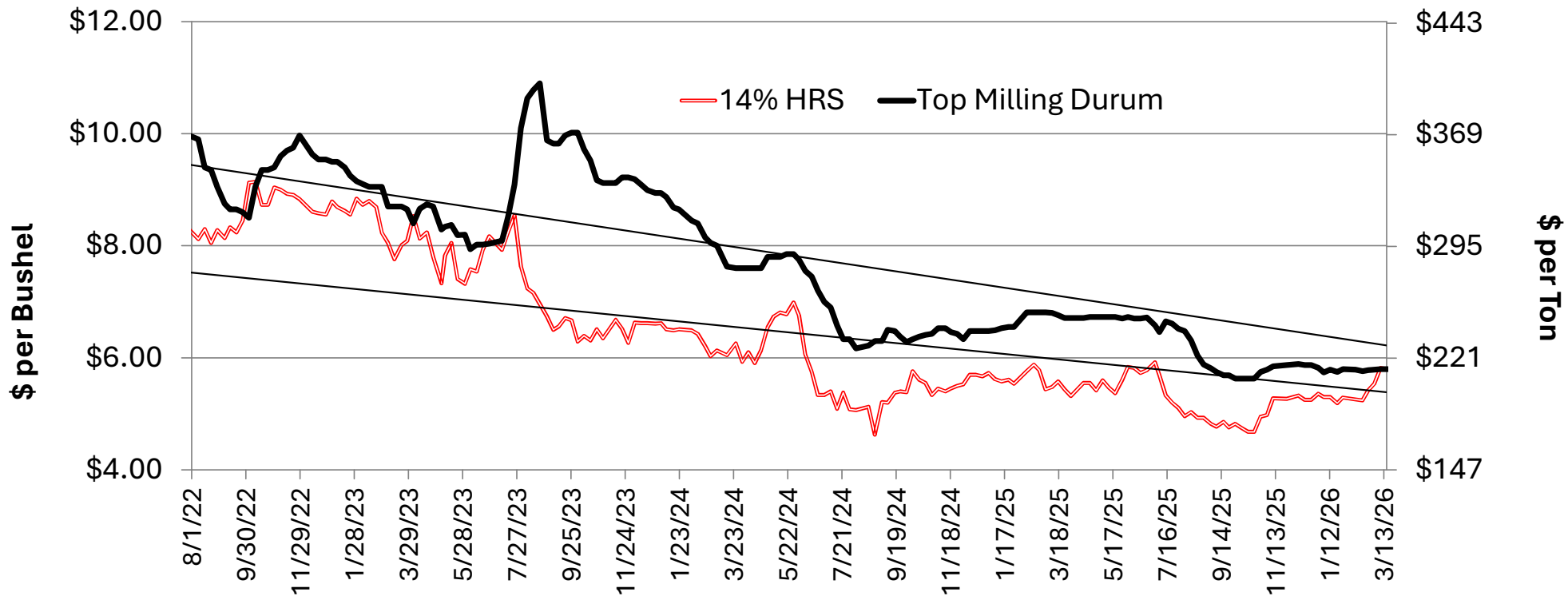
Source: NDSU / NDWC Feb 2026



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Average North Dakota Producer Bids Hard Red Spring and Durum Wheat



Source: Elevator weekly prices March 2026

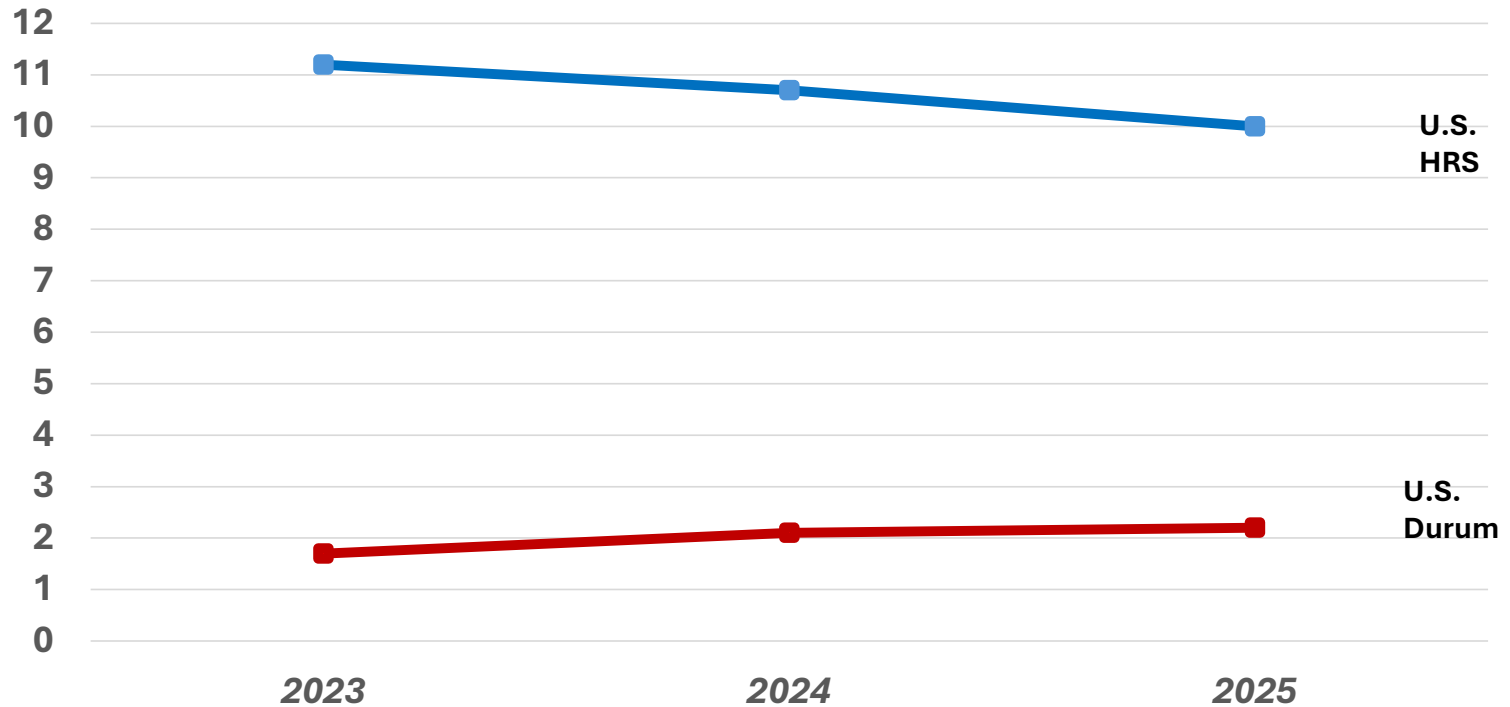


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Recent Trend U.S. Planted Acres HRS and Durum

Million Acres



USDA / NDWC



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U.S. CROP INSURANCE PRICE LEVELS

	2026	2025	2024	2023
Hard Red Spring	\$6.19 / bu	\$6.55 / bu	\$6.84 / bu	\$8.87 / bu
Durum	\$6.98 / bu	\$7.73 / bu	\$7.89 / bu	\$10.11 / bu

Spring prices are set by USDA, Risk Management Agency, based on the average price of MPLS September futures during the month of February for HRS. Durum's price is based on the ten year average premium/discount to HRS on cash prices.

Source: USDA

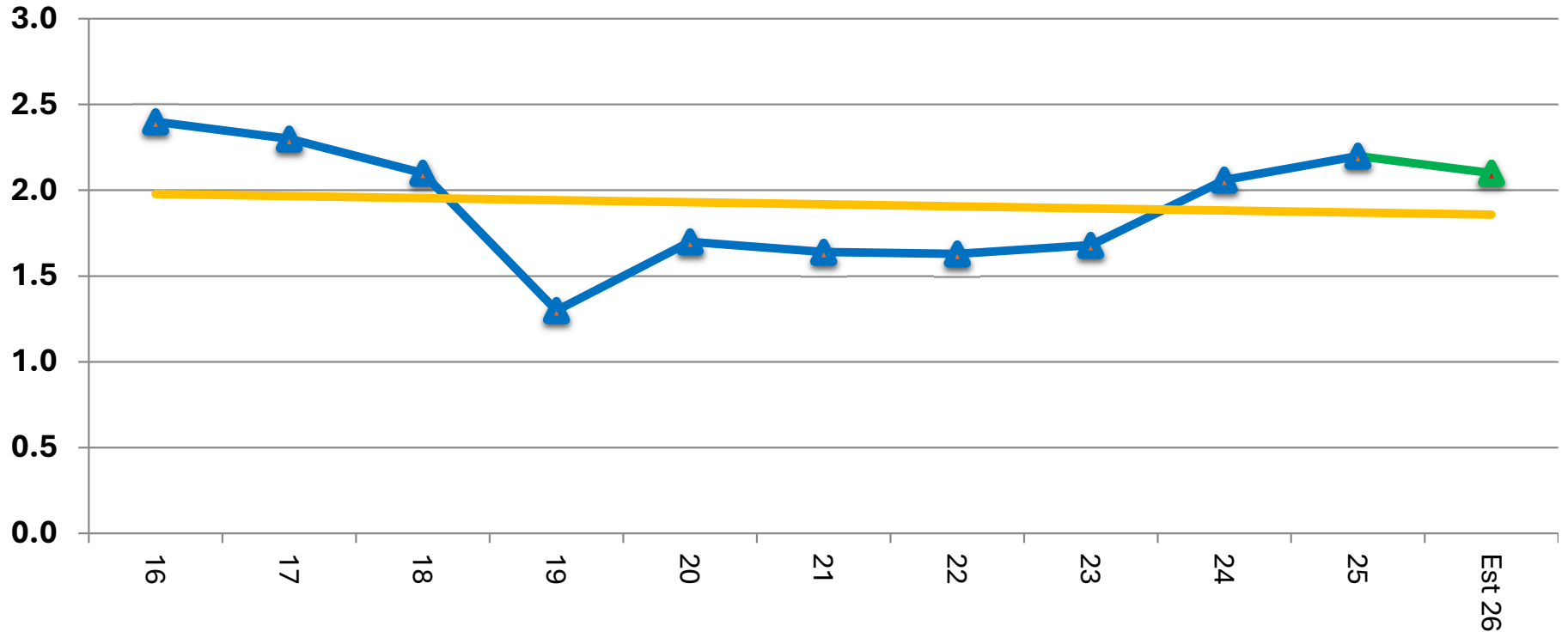


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U.S. DURUM WHEAT PLANTED AREA

Million Acres



Source: USDA / NDWC

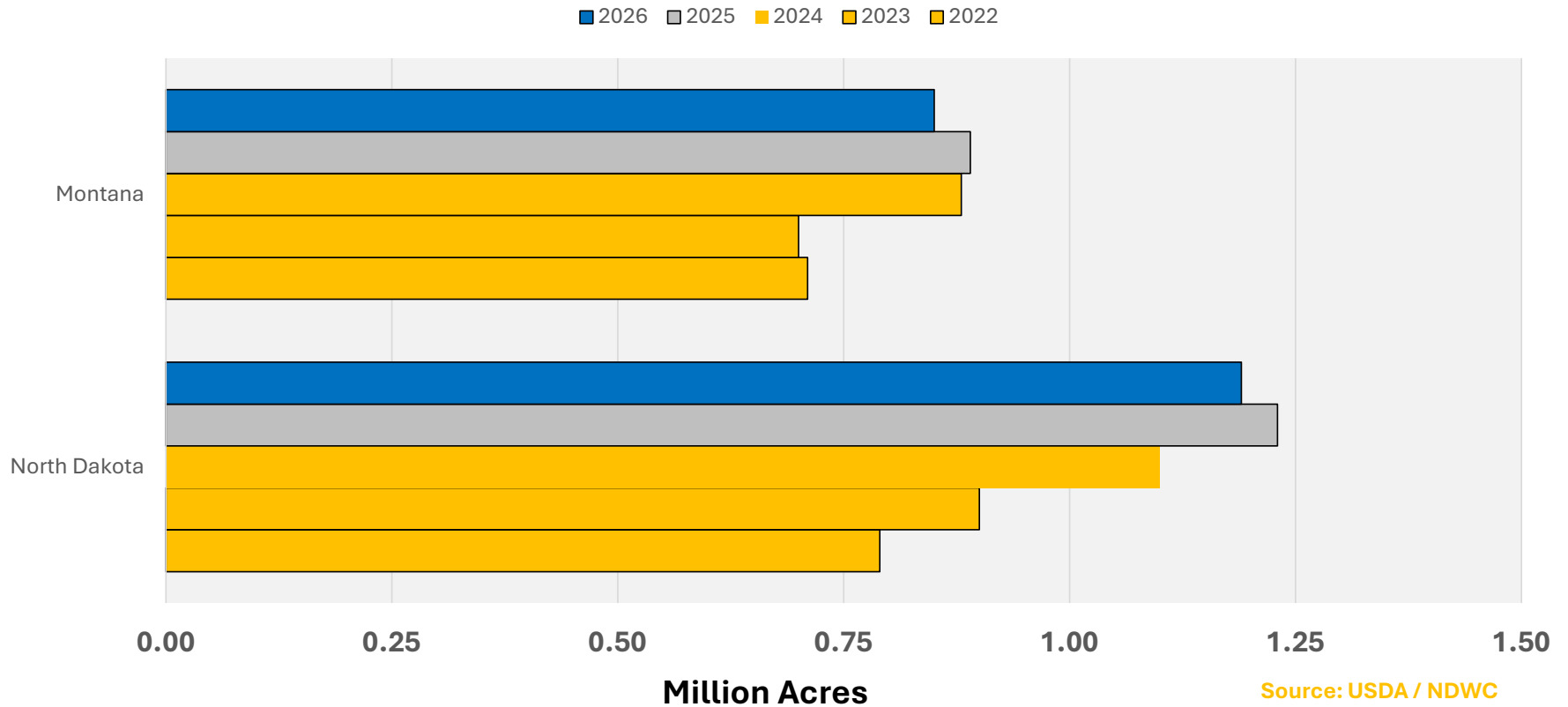


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U.S. DURUM WHEAT

PLANTED AREA BY STATE -- NORTHERN REGION



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North American Drought Monitor

January 31, 2026

(Released Friday, Feb. 13, 2026)

Analysts:

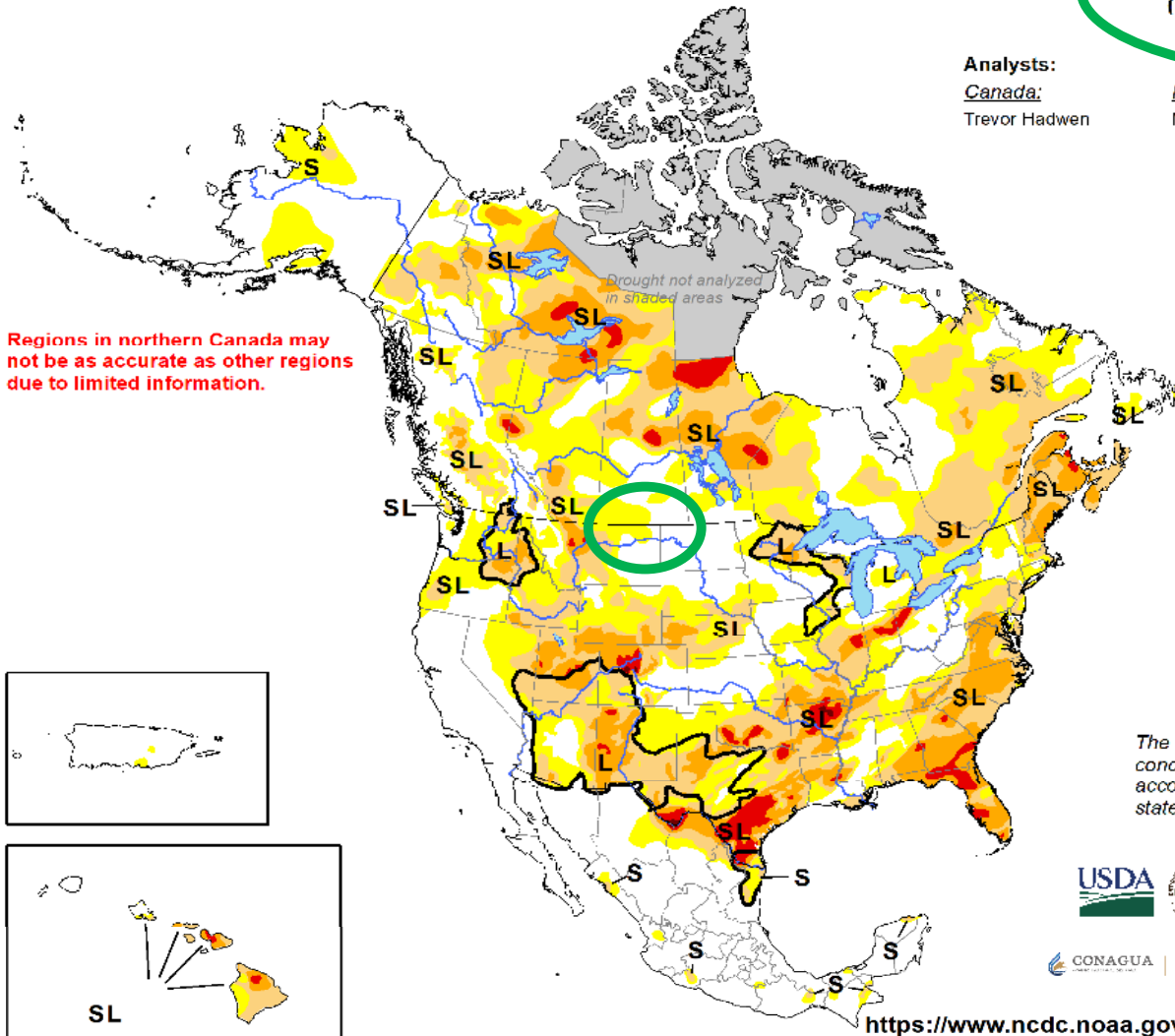
Canada:
Trevor Hadwen

Mexico:
Minerva Lopez

USA:
Brian Fuchs*
Lindsay Johnson

(* Responsible for collecting analysts' input & assembling the NA-DM map)

Regions in northern Canada may not be as accurate as other regions due to limited information.



Intensity

- D0 Abnormally Dry
- D1 Moderate Drought
- D2 Severe Drought
- D3 Extreme Drought
- D4 Exceptional Drought

Drought Impact Types:

- Delineates dominant impacts
- S = Short-Term, typically less than 6 months (e.g. agriculture, grasslands)
- L = Long-Term, typically greater than 6 months (e.g. hydrology, ecology)

The Drought Monitor focuses on broad-scale conditions. Local conditions may vary. See accompanying text summary for forecast statements.



<https://www.ncdc.noaa.gov/temp-and-precip/drought/nadm/>



Other Issues

- **Proposed merger of Union Pacific and Norfolk Southern railroads. It will have a significant negative impact on durum and hard red spring wheat origination regions, and their access to mills in the eastern half of the United States.**
 - **No UP origination. BNSF is largest origination railroad for durum and HRS that flows to eastern mills....likely to reduced “switch” access and higher costs.**
- **Farm profitability - Negative returns on many crops for consecutive years are straining balance sheets and equity. Marginal farms are having difficulty renewing operating notes. Increase in farm bankruptcies and likely to see further consolidation at the farm and country elevator level. Northern Plains may not be as serious as other parts of the country...yet. Improved crop insurance protection will be beneficial going forward.**
- **MAHA report and future developments**



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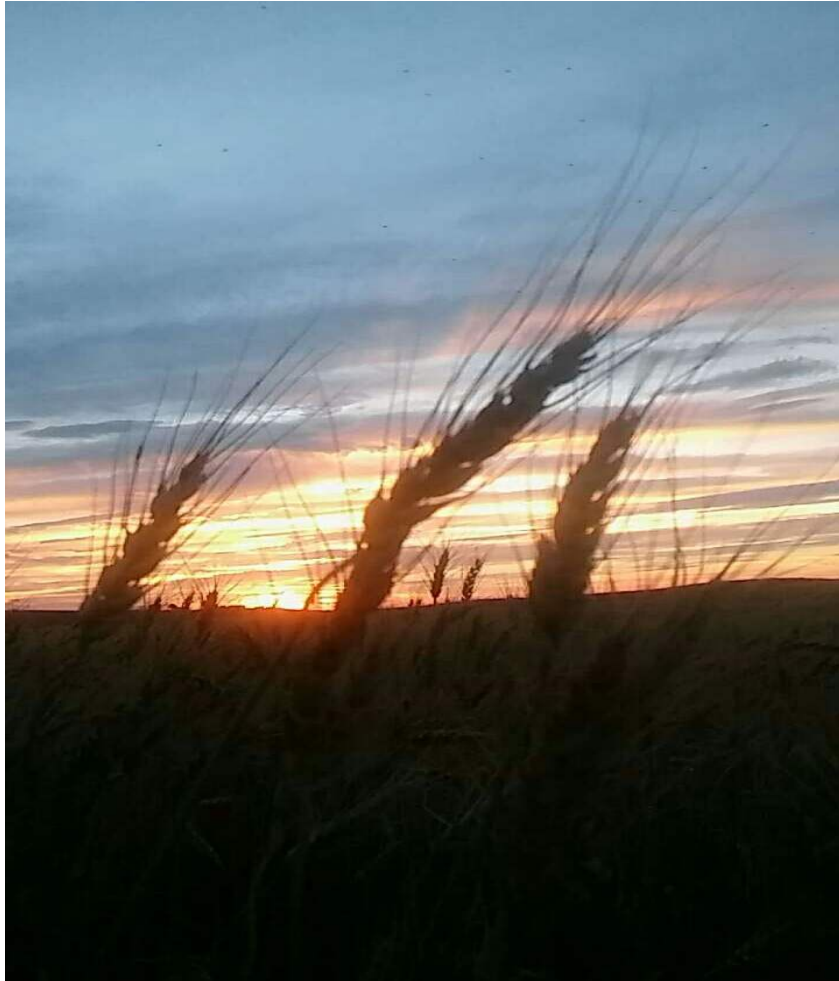
Summary

- **2026 likely to see lower world and North American durum production**
- **Increased “end of year” carryover will be beneficial in stabilizing supplies in early part of the year**
- **Wild cards are weather developments (growing season and harvest weather), and trend in new “unknown” variable....Iran conflict and impacts on supply chains, fuel and other costs**
- **Durum has held premium to other wheat types in recent years, but that may shift in 2026 with recent upward price trends in other wheat and commodities**
- **Dynamics in other commodities, and geopolitical issues may actually be larger variable in price volatility than direct durum fundamentals in 2026, outside of drought or adverse harvest weather**
- **Producer profitability is a significant issue and concern in both the U.S. and Canada, and bears watching from end-user perspective.**



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THANK YOU!

QUESTIONS?



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