Semouliers

THE EUROPEAN DURUM WHEAT MILLING INDUSTRY

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DG Agri - Expert Group Crops Market Observatory
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ABOUT SEMOULIERS

SEMOULIERS – Union des Associations des Semouliers de l'Ue is the Association of semolina Industries in Europe.

MISSION

The mission of Semouliers is to ensure the representation and the promotion of the interests of the semolina Industry at european and international levels.

MEMBERS

Semouliers membership today consists of national associations from EU Member States as full members and of observer members from non-EU countries.

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THE STRUCTURE OF THE EUROPEAN DURUM WHEAT MILLING INDUSTRY

The number of mills is constantly decreasing

According to Semouliers, there are about 180 durum wheat mills in the European Union located mainly in the Mediterranean Countries. Italy alone has about 125 mills with durum wheat located essentially in Sicily and Apulia.

The semolina Industry appears to be undergoing a slow but progressive reduction of the number of active plants: for instance, there was about 250 durum mills in the European Union in 2000. The reduction concerns in particular the small mills with a lower daily output capacity.

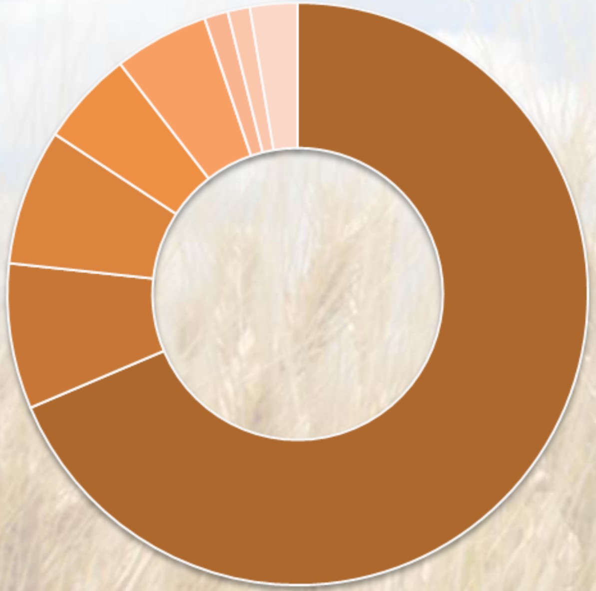
OTHER MAIN COUNTRIES

Greece	**12 mills**
Spain	**8 mills**
Germany	**7 mills**
France	**5 mills**

THE MAIN FIGURES OF THE EUROPEAN DURUM WHEAT MILLING INDUSTRY

Capacity	Durum wheat processed	Semolina produced
		
10,00 Mt	**8,50 Mt**	**5,70 Mt**

THE EU SEMOLINA PRODUCTION



Main semolina producing countries

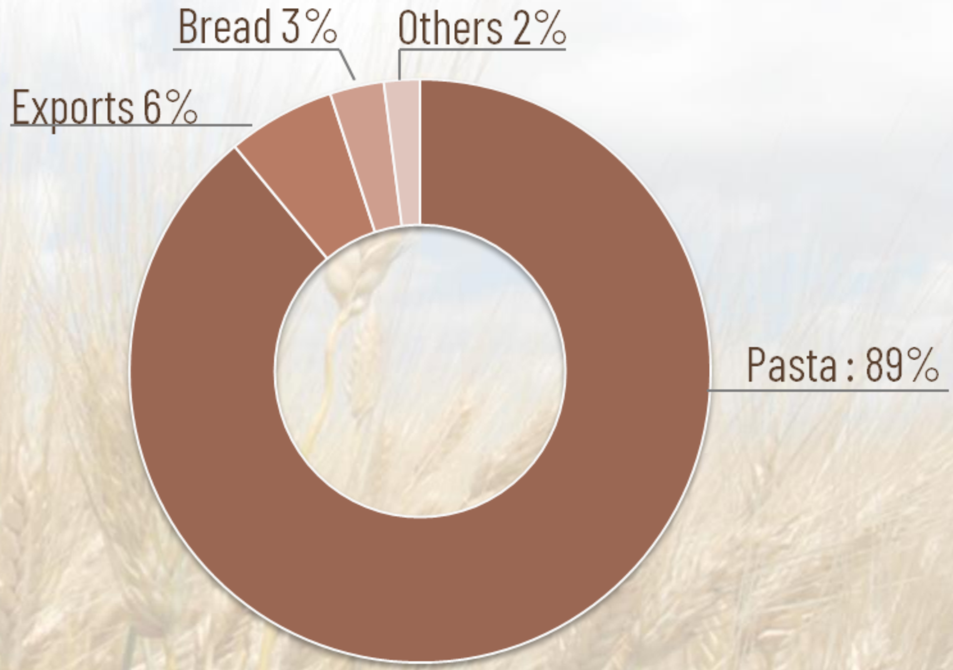
Country	Production
Italy	3.900.000 t
France	460.000 t
Spain	430.000 t
Germany	300.000 t
Greece	300.000 t
Portugal	75.000 t
BeNeLux	70.000 t
Others	150.000 t

An EU production of semolina which remains constant over the years.

The european production of semolina remains constant over the years around 5.7 million tons.

EUROPEAN SEMOLINA DESTINATIONS

In the EU, the production of semolina is mainly used for pasta production.



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THE IMPORTANCE OF THE SUPPLY IN RAW MATERIALS

An extremely localised world production: the Mediterranean basin and the North American continent (and more particularly Arizona, Montana, North and South Dakota in the United States, and Saskatchewan, Alberta and Manitoba in Canada) alone account for close on 80% of the world production of durum wheat.

The effective and efficient management of the supply in raw materials wheat sector - in terms of quantity, quality and trade - is one of the most important elements as regards the competitiveness of the milling industry, also in light of its impact (up to 80%) on the sector's turnover.

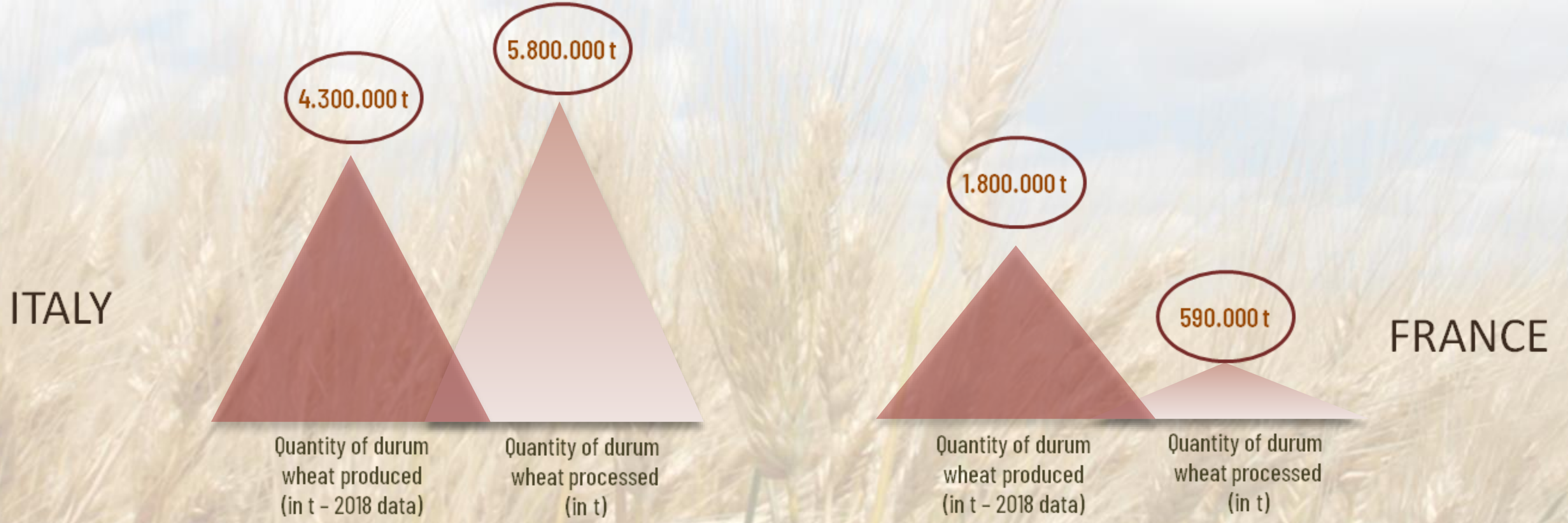
THE SUPPLY OF THE EUROPEAN DURUM WHEAT MILLING INDUSTRY

The EU production of durum wheat is insufficient to cover the needs of the Industry

The imports of durum wheat from non EU countries are overall indispensable both for quantitative and qualitative reasons.

Among the 5 main EU countries producing semolina, France, Spain and Greece are self sufficient in durum wheat while the imports of durum wheat are indispensable for Italy and Germany both for quantitative (and for Italy also for qualitative reasons).

THE SUPPLY OF THE EUROPEAN DURUM WHEAT MILLING INDUSTRY



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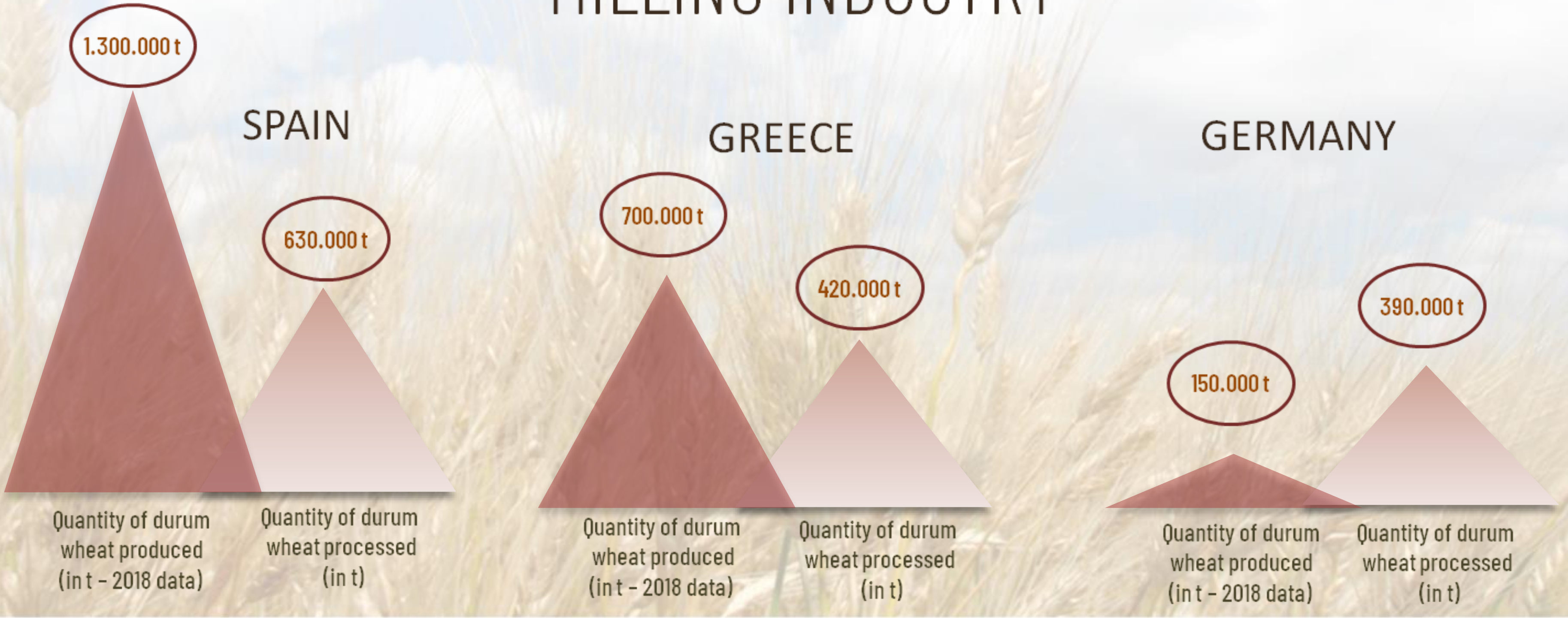
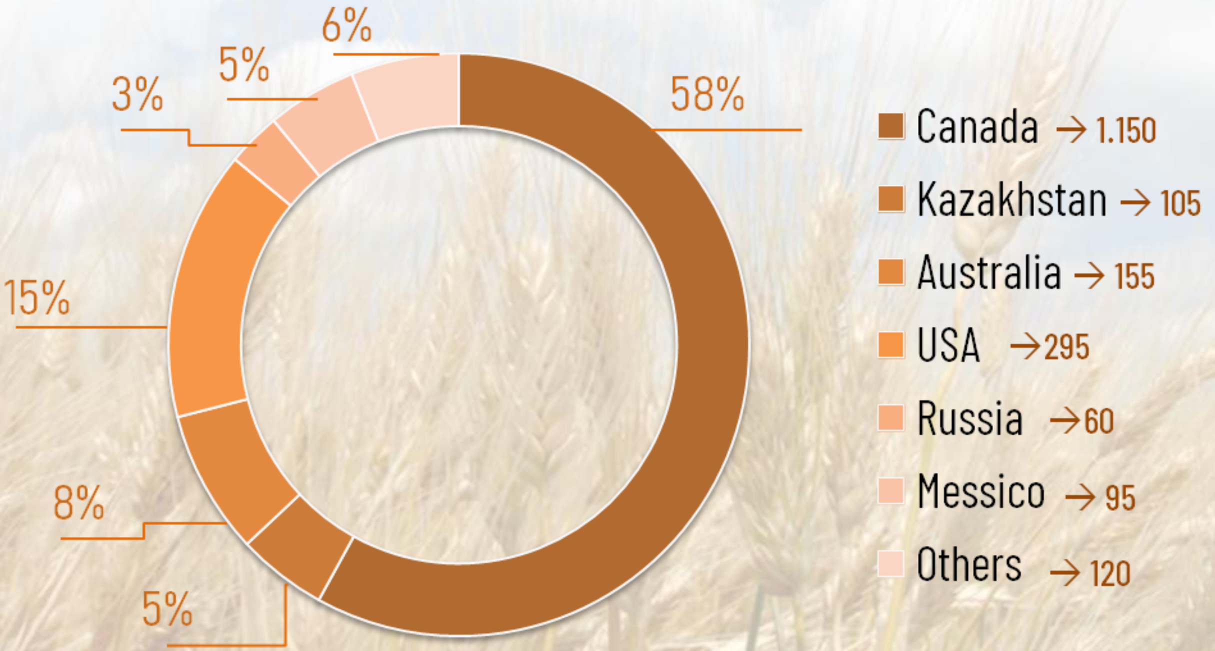


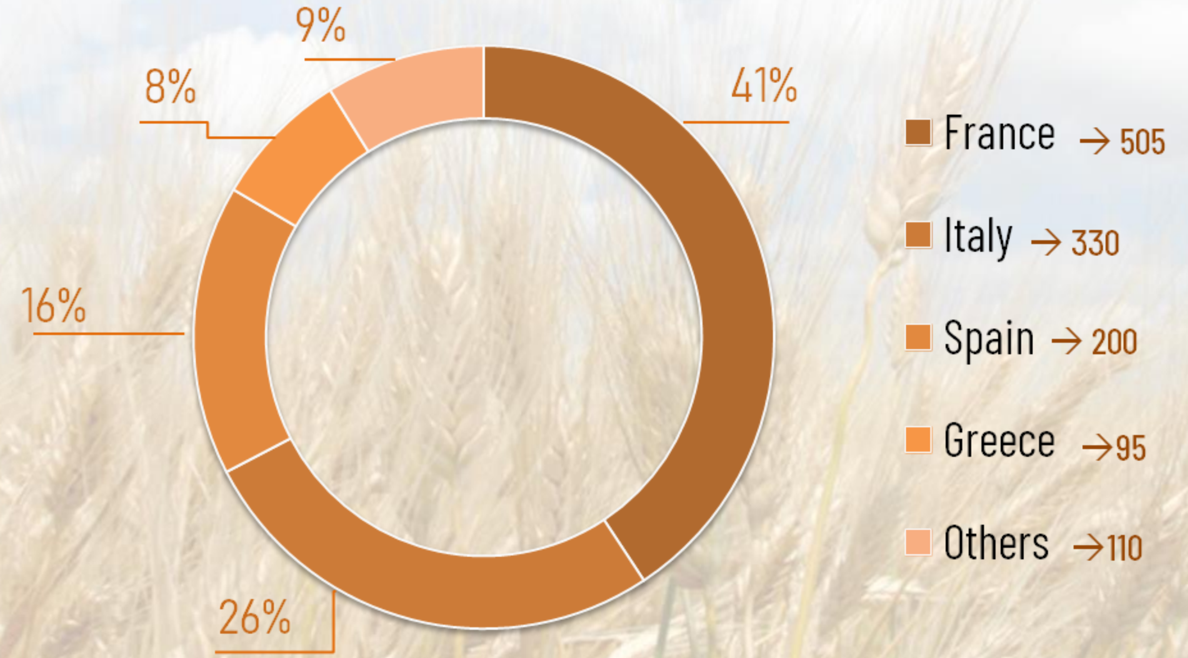
EU DURUM WHEAT IMPORT ORIGINS

Average 2012/2017 (in thousand tons)



EU MS EXPORTING DURUM WHEAT (INCL. FLOUR)

Average 2012/2017 (in thousand tons)



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PASTA: INTERNAL MARKET AND EXPORTS

CONSTANT AND SLOW EROSION OF INTERNAL CONSUMPTION OF PASTA

in consideration of the advanced maturity of the sector and the very high penetration in families. Growing attention to niche products (organic, whole grains, ancient grains or other cereals other than wheat) or for celiac

POSITIVE PERFORMANCE OF PASTA EXPORTS

which represent a very important commercial outlet. By way of example, almost 60% of the italian pasta production is exported to EU countries or third countries.

TO CONCLUDE:

- The European Durum Wheat Milling Industry is mainly located in the Mediterranean area and Germany

- The total milling capacity is stable with fewer but more efficient mills

- The durum wheat semolina is mainly used for pasta production

- The world durum wheat production is extremely localised and the EU production is historically insufficient for quality and quantity

- Positive performance of the pasta export with growing demand of new products


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THANK YOU