

Global Cocoa Bean Shell Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 394.2 m
Forecast (2031)	USD 650.9 m
CAGR (2021-2031)	8.7%
Study period	2021-2031
Largest region	Europe · 35.8%
Fastest-growing region	Asia-Pacific · 10.5%
Market concentration	Moderate
Licence	Individual / Company

The global cocoa bean shell market reached USD XXX million in 2025 and will expand to USD XXX million by 2031, advancing at an XX% CAGR. Commercial demand is moving beyond low-value combustion and feed uses toward food-grade fibre, cocoa infusions, functional extracts, soil amendments and bio-based materials. Europe held XX% of market value in 2025, supported by its large cocoa-grinding base, established ingredient processors and investment in circular manufacturing. Asia-Pacific will record the fastest regional growth at XX% annually as processors in Japan, Indonesia, Malaysia and Singapore commercialize higher-value shell applications.

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Executive summary

The global cocoa bean shell market reached USD XXX million in 2025 and will expand to USD XXX million by 2031, advancing at an XX% CAGR. Commercial demand is moving beyond low-value combustion and feed uses toward food-grade fibre, cocoa infusions, functional extracts, soil amendments and bio-based materials. Europe held XX% of market value in 2025, supported by its large cocoa-grinding base, established ingredient processors and investment in circular manufacturing. Asia-Pacific will record the fastest regional growth at XX% annually as processors in Japan, Indonesia, Malaysia and Singapore commercialize higher-value shell applications.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global cocoa bean shell market generated USD XXX million in 2025 and will reach USD XXX million by 2031.
- Commercial market volume totaled XXX tonnes in 2025, representing food-grade, feed-grade and industrial shell streams entering a defined economic use.
- The International Cocoa Organization recorded global cocoa grindings of XXX tonnes in cocoa year 2023/24, establishing the principal physical feedstock base for bean-shell recovery.
- Europe accounted for XX% of 2025 market value and processed approximately XXX tonnes of cocoa beans in 2023/24, according to the International Cocoa Organization.
- Cleaned whole and coarse-milled shells remained the largest product form at XX% of 2025 revenue, while extracts and functional fractions will grow fastest at XX% annually.
- Food ingredients and dietary fibre led applications with a XX% share; bio-based materials will post the highest application CAGR at XX%.
- Cargill directs at least XXX tonnes of ground cocoa shells annually from Zaandam to its Amsterdam biomass system.
- ofi used XXX tonnes of residual cocoa shells in 2022 at its Koog aan de Zaan facility, generating energy equivalent to XXX cubic metres of natural gas.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Cocoa Bean Shell Market Trends and Growth Drivers

Cocoa bean shell economics are being reset by the convergence of high energy costs, corporate waste targets and demand for recognizable plant-based ingredients. The same shell stream can generate less than USD XXX per tonne as unprocessed fuel or several thousand dollars per tonne after food-grade milling, extraction and formulation, making segregation and specification control central strategic decisions.

Supply remains structurally tied to cocoa grindings rather than agricultural harvest alone. Europe possesses the largest recoverable pool, but origin processing is shifting incremental availability toward West Africa and Southeast Asia. This creates a location trade-off between proximity to shell generation, access to conversion technology and distance from premium consumer markets.

Food safety defines the boundary between commodity residue and specialty ingredient. Suppliers that manage PAHs, heavy metals, microbes, fat carryover, theobromine and sensory consistency can access fast-growing beverage, nutrition and beauty markets; uncontrolled streams remain concentrated in energy, soil and restricted feed uses.

Growth drivers

Circular manufacturing converts a disposal stream into revenue

Large cocoa processors are assigning measurable financial and carbon value to shells that were previously discarded or burned without optimization. Co-located cleaning, milling, pyrolysis and steam systems lower waste-handling expenditure while creating saleable ingredients, energy or soil products.

Cocoa-shell beverages enter premium wellness channels

Cocoa-shell tea combines a recognizable chocolate aroma with low sugar and a lighter stimulant profile than coffee. Specialty tea brands, chocolate makers and hospitality operators are widening trial, while ready-to-drink formats improve repeat purchase and market accessibility.

Food formulators seek natural fibre and clean-label functionality

Finely milled shell supplies insoluble dietary fibre, color and cocoa flavor in bakery, cereals, snacks and plant-based foods. Reformulation demand raises the value of validated food-grade material and supports investment in sieving, decontamination and flavor standardization.

A larger grinding footprint expands recoverable feedstock

Cocoa bean shells are generated during roasting and winnowing, making grindings the central determinant of supply. Additional origin processing in Côte d’Ivoire, Ghana and Indonesia shortens the route to shell valorization and creates opportunities for regional preprocessing clusters.

Biomass systems accelerate factory decarbonization

Shells have become a dependable captive fuel for steam generation at cocoa and adjacent food-processing sites. Corporate emissions targets and volatile natural-gas costs support further boiler deployment,

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particularly where shell generation and heat demand are co-located.

Extraction technology unlocks specialty compounds

Improved aqueous, enzymatic and supercritical extraction routes are increasing recovery of polyphenols, theobromine, pectin and ceramide-related fractions. These applications generate the highest revenue per tonne and attract partnerships across food, beauty and nutraceutical value chains.

Restraints

Contaminant control raises food-grade conversion costs

Shells concentrate surface contaminants and can develop elevated PAH levels during poorly controlled drying or roasting. Testing, segregation, validated heat treatment and supplier qualification increase operating cost but remain essential for food-market access.

Theobromine constrains feed and household applications

Residual theobromine limits inclusion rates for several animal species and creates particular toxicity concerns for dogs and cats. Suppliers must control labeling, formulation and customer selection, narrowing the addressable market for untreated shells.

Variable shell quality limits industrial standardization

Moisture, nib carryover, particle size, flavor, fat content and microbiological condition vary with origin and processing line. Inconsistent specifications complicate continuous manufacturing and force buyers to maintain wider acceptance bands or additional pretreatment.

Captive energy use restricts merchant availability

Processors frequently consume shells internally because on-site combustion avoids transport and provides immediate fuel savings. Higher-value buyers must offer dependable offtake economics to displace this captive use, particularly during periods of elevated energy prices.

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Cocoa Bean Shell Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Circular manufacturing converts a disposal stream into revenue	XXX	XXX	XXX
Cocoa-shell beverages enter premium wellness channels	XXX	XXX	XXX
Food formulators seek natural fibre and clean-label functionality	XXX	XXX	XXX
A larger grinding footprint expands recoverable feedstock	XXX	XXX	XXX
Biomass systems accelerate factory decarbonization	XXX	XXX	XXX
Extraction technology unlocks specialty compounds	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Contaminant control raises food-grade conversion costs	XXX	XXX	XXX
Theobromine constrains feed and household applications	XXX	XXX	XXX
Variable shell quality limits industrial standardization	XXX	XXX	XXX
Captive energy use restricts merchant availability	XXX	XXX	XXX

Source: XXX

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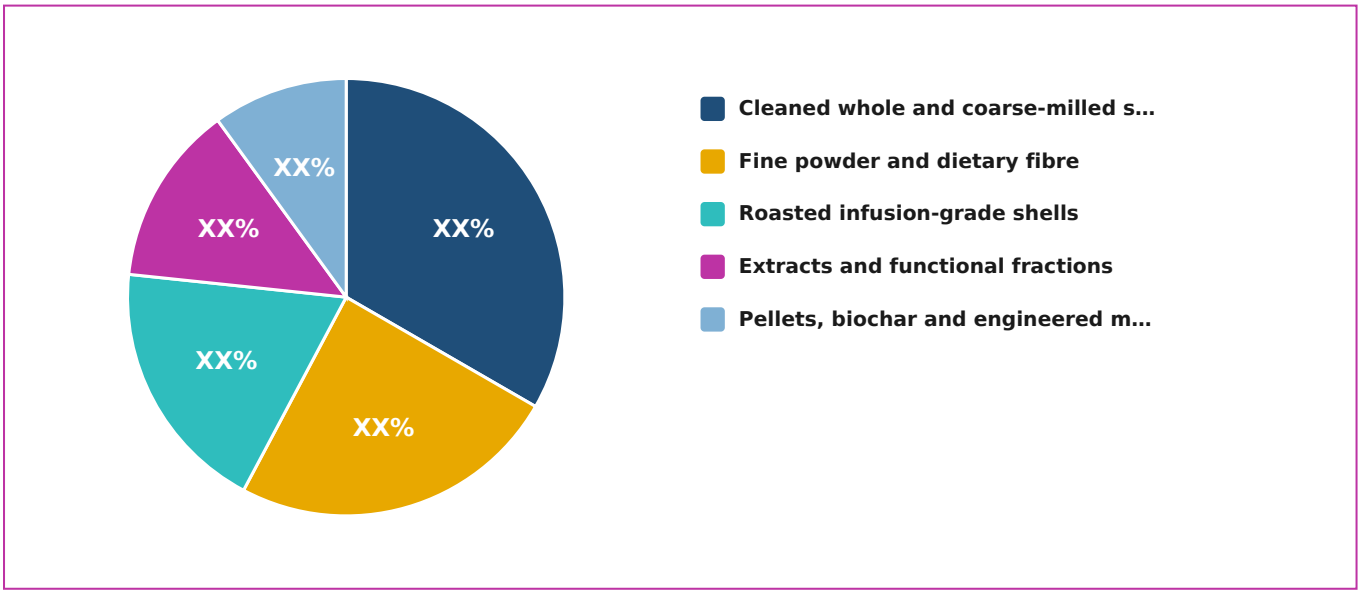
Cocoa Bean Shell Market Segmentation by Form, Application, Grade and Channel

By Product Form

Whole and coarse-milled material dominates because it serves feed, infusions, combustion and soil applications with limited conversion. Fine shell powder and dietary fibre command higher prices through controlled milling and food-grade validation. Extracts and engineered compounds grow fastest as suppliers isolate polyphenols, methylxanthines, pectin and ceramide-related fractions.

Value share by product Form, 2025



Source: XXX

Value by product Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Cleaned whole and coarse-milled shells	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fine powder and dietary fibre	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Roasted infusion-grade shells	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Extracts and functional fractions	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pellets, biochar and engineered materials	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Food ingredients lead through bakery, cereal, snack and plant-based formulations that use shell fibre, flavor and color. Beverage demand is expanding through loose-leaf infusions, tea bags, brewing adjuncts

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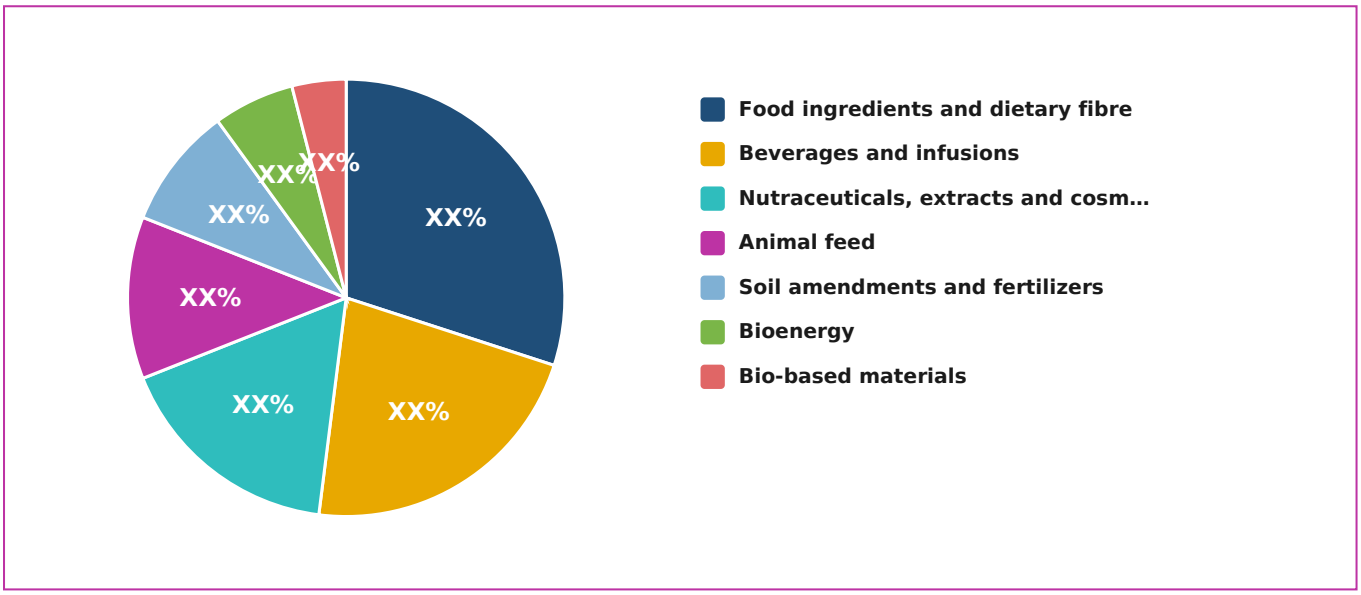
and ready-to-drink concepts. Bio-based materials remain smaller but accelerate as companies validate shell fillers, resins, paper, textiles, ceramics and molded products.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Food ingredients and dietary fibre	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Beverages and infusions	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Nutraceuticals, extracts and cosmetics	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Animal feed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Soil amendments and fertilizers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bioenergy	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bio-based materials	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Grade

Food-grade material requires controlled sourcing, thermal processing, contaminant testing and microbiological release procedures. Feed grade remains volume-intensive but faces theobromine-related inclusion limits. Industrial grade absorbs heterogeneous streams for combustion, biochar, fertilizer and composite applications.

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Value by grade, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Food grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Feed grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Direct business-to-business agreements dominate because shell quality depends on processor origin, roast profile and segregation practices. Ingredient distributors extend market access for smaller food and nutraceutical users. Digital and specialty channels grow fastest through consumer infusions and small-format supplies to breweries, bakeries and craft manufacturers.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct processor and offtake contracts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ingredient and commodity distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Digital and specialty retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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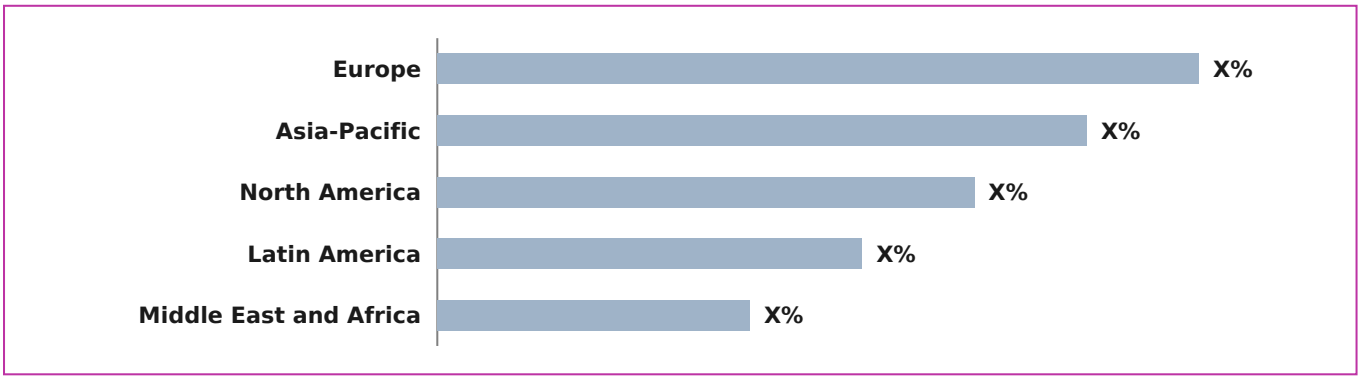
Cocoa Bean Shell Market Regional Analysis and Country Outlook

Europe generated XX% of global market value in 2025, supported by large cocoa-processing clusters in the Netherlands, Germany, Belgium, France, Spain and the United Kingdom. The region combines concentrated shell availability with demanding food-safety standards, mature biomass infrastructure and strong consumer acceptance of upcycled ingredients. Dutch and German processors are particularly active in captive steam generation, while smaller European brands lead premium cocoa-shell infusions.

Asia-Pacific held XX% of market value and will expand at XX% annually through 2031. Japan is developing shell-derived ceramides, resins, textiles and molded goods, while Indonesia, Malaysia and Singapore provide a growing industrial feedstock base. The region's opportunity shifts progressively from untreated shell sales toward extracts, functional powders and engineered materials.

North America accounted for XX% of 2025 value, led by food ingredients, specialty beverages and fertilizer development in the United States and Canada. Latin America benefits from differentiated fine-flavor supply and tourism-linked beverage concepts, while the Middle East and Africa combine strong long-term feedstock potential with an underdeveloped conversion base. Côte d’Ivoire and Ghana will gain share as local grinding and preprocessing capacity expands.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Cocoa Bean Shell Market Competitive Landscape and Company Share

The market is moderately concentrated at the feedstock level because global cocoa grinding is led by Barry Callebaut, Cargill, ofi, ECOM, Fuji Oil's Blommer business, Guan Chong and JB Foods. Competition becomes fragmented downstream, where specialist beverage, fibre, extraction and material developers purchase or recover smaller shell lots. The ten largest commercial participants controlled XX% of 2025 market value.

Scale processors lead through dependable shell availability, contaminant-control systems and the ability to select between merchant sale and captive energy use. ofi and Cargill have deployed shell-fired energy systems, while Barry Callebaut has developed shell-to-biochar capability. Meiji and Lotte illustrate a different strategy: applying cocoa husk to beauty ingredients, resins, textiles, coasters and ceramics to create high-value intellectual property.

Competitive advantage through 2031 will depend on application-specific specifications rather than undifferentiated biomass volume. Acquisitions and joint ventures will focus on extraction, decontamination, pelletization and biomaterial processing, while long-term offtake agreements will link grinding plants to specialist converters. Traceable food-grade lots will remain the most contested supply pool.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Barry Callebaut AG	XXX	XXX	XXX	XXX
Cargill, Incorporated	XXX	XXX	XXX	XXX
ofi	XXX	XXX	XXX	XXX
ECOM Agroindustrial Corp. Limited	XXX	XXX	XXX	XXX
Blommer Chocolate Company	XXX	XXX	XXX	XXX
Guan Chong Berhad	XXX	XXX	XXX	XXX
JB Foods Limited	XXX	XXX	XXX	XXX
Touton S.A.	XXX	XXX	XXX	XXX
Cémoi Group	XXX	XXX	XXX	XXX
Luker Chocolate	XXX	XXX	XXX	XXX
Nestlé S.A.	XXX	XXX	XXX	XXX
Meiji Holdings Co., Ltd.	XXX	XXX	XXX	XXX

Source: XXX

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Cocoa Bean Shell Market Forecast, Scenarios and Commercial Opportunities

The market will add USD XXX million in annual revenue between 2025 and 2031. Food ingredients will remain the largest application, but extracts, bio-based materials and premium beverages will produce a disproportionate share of incremental value. The commercial center of gravity will move from waste management toward specification-led ingredient manufacturing.

Under the central forecast, global value reaches USD XXX million in 2031. An accelerated circularity scenario, driven by faster food approvals, biomaterial scale-up and carbon pricing, raises the 2031 opportunity to USD XXX million; a constrained-supply scenario characterized by weak grindings and slower food-grade qualification yields USD XXX million.

Winning suppliers will segregate shells at source, stabilize them immediately and sell application-ready grades supported by contaminant, microbiological and compositional documentation. Companies that combine feedstock control with proprietary extraction or materials technology will capture the highest margins, while untreated bulk shell will remain exposed to freight and energy-price volatility.

Opportunities

- Standardized food-grade cocoa fibre for bakery, snacks and meat alternatives
- Premium cocoa-shell tea, cold-brew and ready-to-drink formulations
- Ceramide, polyphenol, pectin and theobromine extraction
- Low-carbon fertilizer pellets and high-stability biochar
- Cocoa-shell fillers for bioplastics, paper, textiles and molded products
- Origin-based preprocessing hubs in West Africa, Southeast Asia and Latin America

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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