

Global Flaxseed 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 1.2 bn
Forecast (2031)	USD 1.8 bn
CAGR (2021-2031)	6.3%
Study period	2021-2031
Largest region	Europe · 31.4%
Fastest-growing region	Asia-Pacific · 7.6%
Market concentration	Low
Licence	Individual / Company

The global flaxseed market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Food manufacturers are increasing their use of milled flaxseed and cold-pressed oil as sources of dietary fibre, plant-based omega-3 and clean-label functionality, while feed formulators are using flaxseed to differentiate eggs, dairy products and premium pet nutrition. Europe leads demand with a XX% value share, supported by established bakery consumption and substantial imports from Russia, Kazakhstan, Ukraine and Canada. Asia-Pacific is the fastest-growing region as packaged foods, dietary supplements and modern retail extend flaxseed consumption beyond established oilseed markets.

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Executive summary

The global flaxseed market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Food manufacturers are increasing their use of milled flaxseed and cold-pressed oil as sources of dietary fibre, plant-based omega-3 and clean-label functionality, while feed formulators are using flaxseed to differentiate eggs, dairy products and premium pet nutrition. Europe leads demand with a XX% value share, supported by established bakery consumption and substantial imports from Russia, Kazakhstan, Ukraine and Canada. Asia-Pacific is the fastest-growing region as packaged foods, dietary supplements and modern retail extend flaxseed consumption beyond established oilseed markets.

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

Key findings

- The global flaxseed market generated USD XXX billion in 2025 and is forecast to reach USD XXX billion in 2031.
- World linseed production reached approximately XXX tonnes in 2024, according to FAOSTAT.
- Russia produced approximately XXX tonnes in 2024, equivalent to XX% of reported world output.
- Kazakhstan produced XXX tonnes in 2024 and accounted for approximately one-quarter of global supply.
- Canadian flaxseed production increased from XXX tonnes in 2024 to XXX tonnes in 2025, according to Statistics Canada.
- Europe accounted for XX% of global flaxseed market value in 2025, while Asia-Pacific will record the highest regional CAGR at XX% through 2031.
- Food and beverage applications represented XX% of 2025 market value, led by bakery, cereals, snacks and plant-based foods.
- Whole seed remained the largest product form with a XX% share, but flaxseed oil will grow fastest at a XX% CAGR.

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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 Flaxseed Market Trends and Growth Drivers

Flaxseed sits at the intersection of commodity oilseed markets and premium functional ingredients. Production economics are determined by acreage, yield and competing crop returns, but realized market value increasingly depends on cleaning, microbial controls, granulation, oil stability, certification and the supplier's ability to meet customer-specific specifications.

Demand is becoming less dependent on traditional whole-seed consumption. Industrial bakeries, supplement brands, pet-food formulators and plant-based product developers are purchasing milled seed, cold-pressed oil and functional blends with higher processing content. This mix shift raises average value per tonne and rewards processors capable of preserving flavour and omega-3 quality through the product's shelf life.

Supply leadership has shifted toward Russia and Kazakhstan, while Canada retains a strong reputation in food-grade export channels. The resulting trade structure creates both risk and opportunity: buyers require more diversified sourcing, and processors near emerging production centres can capture value that previously accrued to destination-market millers.

Growth drivers

Omega-3 and fibre fortification moves mainstream

Flaxseed combines alpha-linolenic acid, dietary fibre and lignans in an ingredient familiar to consumers and workable across bakery, cereal, beverage and snack systems. Reformulation activity is shifting demand from commodity whole seed toward cleaned, milled and oxidation-controlled ingredients with higher realized prices.

Clean-label bakery adoption broadens the customer base

Industrial bakeries use milled flaxseed to add visible grains, moisture management and nutritional positioning without unfamiliar additive declarations. Seeded breads, crackers and breakfast products generate repeatable high-volume demand and support multi-year processor contracts.

Plant-based omega-3 demand lifts oil consumption

Cold-pressed flaxseed oil offers a vegan source of alpha-linolenic acid for supplements, functional foods and premium pet products. Improved nitrogen flushing, opaque packaging and antioxidant systems are reducing oxidation losses and extending the addressable distribution radius.

Premium animal nutrition creates value-added outlets

Feed formulators incorporate flaxseed and flax meal to influence the fatty-acid profile of eggs, meat and dairy products and to support premium pet-food claims. This channel also monetizes crushing co-products, strengthening processor economics and reducing exposure to food-grade demand cycles.

Processing investment improves ingredient consistency

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New cleaning, milling, stabilization and cold-pressing capacity is raising throughput and reducing microbiological, foreign-material and rancidity risks. Consistent specifications enable flaxseed to enter larger multinational procurement programmes that were previously difficult for fragmented suppliers to serve.

Asian packaged-food penetration accelerates

Urban consumers in China, India, Japan and Southeast Asia are encountering flaxseed through packaged cereals, bakery products, meal replacements and digital wellness channels. Local milling and smaller retail formats reduce preparation barriers and support the region's XX% forecast CAGR.

Restraints

Concentrated harvest exposure increases price volatility

A large share of global output is concentrated in Russia and Kazakhstan, while Canadian acreage responds sharply to relative crop returns. Weather, freight disruption and producer switching can therefore move food-grade availability and contract prices within a single procurement cycle.

Oxidation limits oil and milled-product shelf life

Flaxseed's high polyunsaturated-fat content makes milled seed and oil sensitive to oxygen, heat and light. Processors must invest in stabilization, controlled storage and protective packaging, increasing conversion costs and complicating distribution in hot climates.

Cyanogenic glycoside controls raise compliance costs

European maximum levels for hydrocyanic acid require supplier testing, lot segregation and controlled processing, particularly for products sold directly to consumers. Smaller exporters face higher per-unit laboratory and documentation costs when serving tightly regulated food channels.

Alternative seeds and omega-3 sources intensify substitution

Chia, hemp, fish oil and algal oil compete with flaxseed for shelf space, formulation budgets and health positioning. Flaxseed retains a cost and fibre advantage, but oil products must overcome lower conversion of alpha-linolenic acid compared with direct EPA and DHA sources.

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Flaxseed Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Omega-3 and fibre fortification moves mainstream	XXX	XXX	XXX
Clean-label bakery adoption broadens the customer base	XXX	XXX	XXX
Plant-based omega-3 demand lifts oil consumption	XXX	XXX	XXX
Premium animal nutrition creates value-added outlets	XXX	XXX	XXX
Processing investment improves ingredient consistency	XXX	XXX	XXX
Asian packaged-food penetration accelerates	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Concentrated harvest exposure increases price volatility	XXX	XXX	XXX
Oxidation limits oil and milled-product shelf life	XXX	XXX	XXX
Cyanogenic glycoside controls raise compliance costs	XXX	XXX	XXX
Alternative seeds and omega-3 sources intensify substitution	XXX	XXX	XXX

Source: XXX

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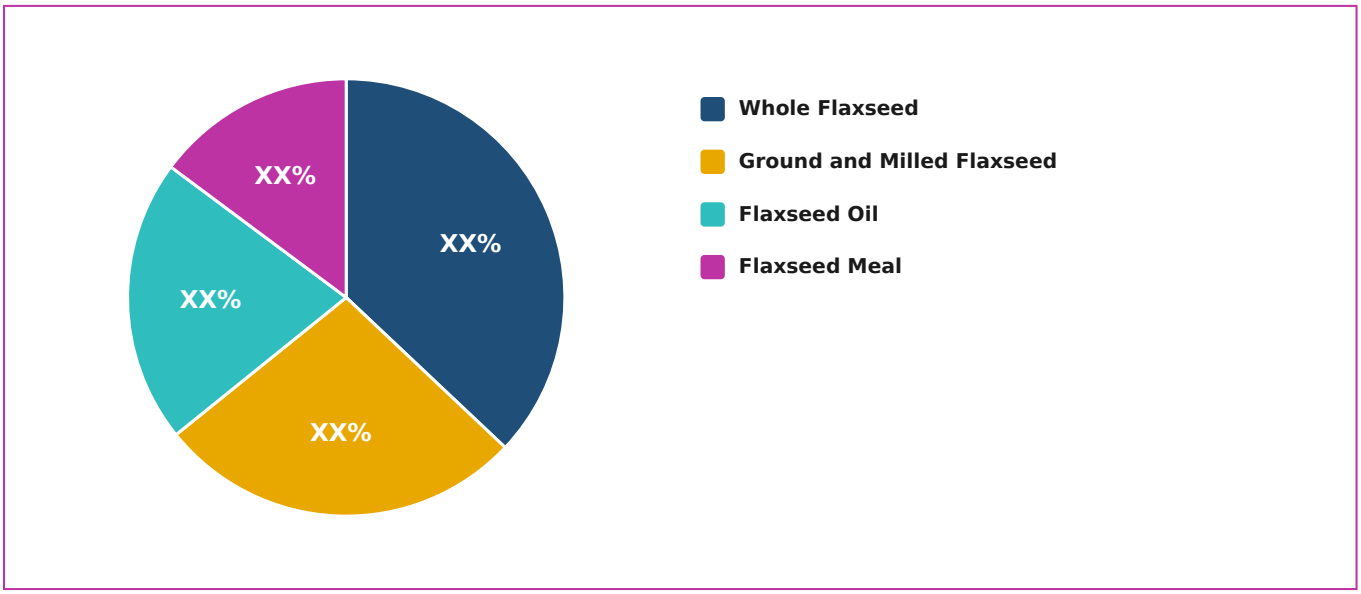
Flaxseed Market Segmentation by Form, Nature, Application and Channel

By Product Form

Whole seed remains the largest form because it serves bakery toppings, cereal blends, household use and international commodity trade with limited conversion. Ground flaxseed is gaining share as manufacturers seek immediate ingredient functionality and better nutrient accessibility. Flaxseed oil records the fastest growth through supplements, functional foods, pet nutrition and premium culinary channels, while meal provides a cost-effective feed and protein-rich co-product outlet.

Value share by product Form, 2025



Source: XXX

Value by product Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Whole Flaxseed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ground and Milled Flaxseed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Flaxseed Oil	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Flaxseed Meal	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Nature

Conventional flaxseed dominates bulk food, feed and industrial applications because of its deeper grower base and lower procurement cost. Organic demand is concentrated in natural-food brands, premium

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bakery, supplements and direct-to-consumer channels. Limited certified acreage, segregation requirements and audit costs preserve an organic price premium and encourage multi-year sourcing agreements.

Value by nature, USD bn

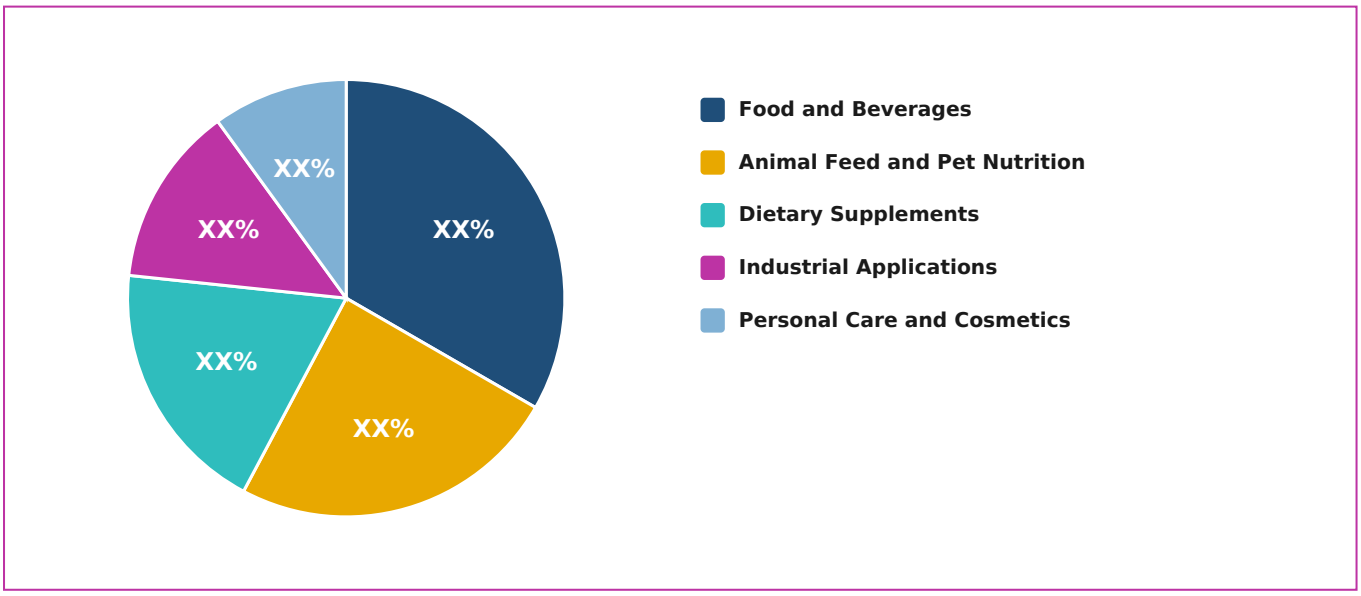
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Bakery, cereal, snack and plant-based food manufacturers form the largest demand base because flaxseed contributes texture, fibre and visible nutritional cues. Animal feed consumes whole seed and meal, including formulations designed to enrich eggs and animal products with omega-3. Dietary supplements grow fastest through capsules, bottled oils, powders and blended nutrition products, while industrial linseed oil remains tied to coatings and other drying-oil uses.

Value share by application, 2025



Source: XXX

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Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Food and Beverages	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Animal Feed and Pet Nutrition	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dietary Supplements	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Personal Care and Cosmetics	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Direct and distributor-mediated business-to-business sales dominate because bakeries, crushers, feed mills and ingredient blenders purchase contracted bulk volumes. Retail demand includes packaged whole seed, meal and oil sold through supermarkets, natural-food stores and pharmacies. E-commerce expands access to specialist organic, cold-pressed and blended products and is particularly influential in emerging Asian consumer markets.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Business-to-Business	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail and E-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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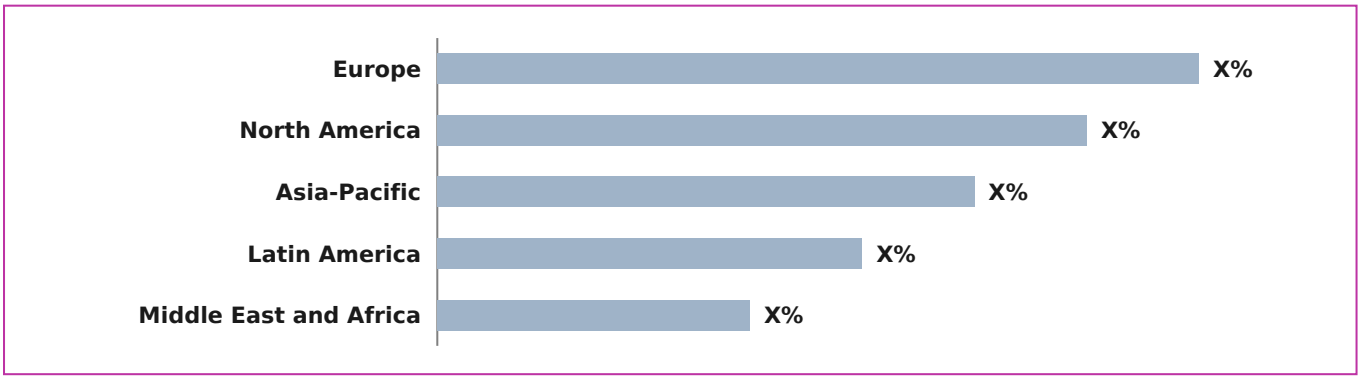
Flaxseed Market Regional Analysis and Country Outlook

Europe held XX% of global market value in 2025. Germany, the United Kingdom, France and the Nordic markets support mature demand for seeded bread, breakfast cereal, organic foods and cold-pressed oils, while the Netherlands and Belgium operate as important import and redistribution hubs. Europe received substantial 2024 supply from Russia, Kazakhstan, Ukraine and Canada, making origin diversification, residue compliance and logistics resilience central procurement priorities.

North America accounted for XX% of value, supported by Canadian production, established ingredient processors and strong demand from natural foods, supplements and premium animal nutrition. Canada's crop rebounded to XXX tonnes in 2025, improving processor utilization and export availability. The removal of the Canada-EU flaxseed sampling and testing protocol from May 2026 strengthens Canada's competitive position in higher-value European food channels.

Asia-Pacific will grow at XX% annually through 2031, led by China, India, Japan and Australia. China combines significant domestic production with demand for edible oil and traditional foods, while India is expanding packaged seed, wellness and e-commerce sales. Latin America and the Middle East and Africa remain smaller markets but offer above-average growth in functional bakery, imported health foods and feed applications.

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
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	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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Flaxseed Market Competitive Landscape and Company Share

The flaxseed market is structurally fragmented, with the ten largest suppliers accounting for XX% of 2025 value. Global agricultural merchants participate in origination and bulk trade, while specialist processors compete through food-grade cleaning, milling, cold pressing, organic certification, identity preservation and customer-specific blends. Regional cooperatives and exporters remain influential because procurement access is closely tied to local crop networks.

Scoular, ADM, Cargill, Richardson International, Viterra and AgMotion provide scale in origination, logistics and risk management. Grain Millers, Bioriginal, CanMar Foods, Healthy Food Ingredients, TA Foods and Linwoods compete more directly in value-added food ingredients and consumer-ready products. Grain Millers' new Saskatchewan processing facility and Bioriginal's expansion of traceable plant-based omega-3 oils illustrate the shift toward controlled processing and differentiated end markets.

Competition through 2031 will centre on food-safety assurance, oxidation control, stable sensory performance and documented origin. Acquisitions will remain selective because physical sourcing is fragmented, but processors will invest in regional cleaning and milling assets, application support and long-term grower programmes. Suppliers able to sell food-grade seed, oil and meal from the same raw-material stream will maintain the strongest margin resilience.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Archer Daniels Midland Company	XXX	XXX	XXX	XXX
Cargill, Incorporated	XXX	XXX	XXX	XXX
The Scoular Company	XXX	XXX	XXX	XXX
Grain Millers, Inc.	XXX	XXX	XXX	XXX
Bioriginal Food & Science Corp.	XXX	XXX	XXX	XXX
Richardson International Limited	XXX	XXX	XXX	XXX
Viterra Limited	XXX	XXX	XXX	XXX
CanMar Foods Ltd.	XXX	XXX	XXX	XXX
Healthy Food Ingredients, LLC	XXX	XXX	XXX	XXX
TA Foods Ltd.	XXX	XXX	XXX	XXX

Source: XXX

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Flaxseed Market Forecast and Commercial Opportunities

Global market value will increase by USD XXX million between 2025 and 2031. Volume growth will remain steady, while product mix will shift toward milled seed, cold-pressed oil, organic grades and formulated ingredients. Food and beverages will retain the largest application share, but dietary supplements and pet nutrition will deliver the highest category growth.

The central forecast assumes normalized Black Sea trade, expanding Central Asian processing and moderate real price appreciation for food-grade flaxseed. A supply-disruption scenario would lift nominal market value but constrain consumption in price-sensitive feed and industrial uses; a high-adoption scenario would be driven by broader bakery fortification, Asian retail penetration and flax-derived protein commercialization.

The strongest returns will accrue to businesses that control quality from farm contracting through final packaging. Stabilization technology, rapid contaminant testing, certified organic supply, application-specific granulation and low-oxygen oil handling will distinguish premium suppliers from commodity traders.

Opportunities

- Stabilized milled flaxseed for industrial bakery customers
- Cold-pressed and microencapsulated flaxseed oil
- Omega-3-enriched eggs, dairy and aquaculture feed
- Organic and regenerative-certified supply programmes
- Flax protein concentrates and functional fractions
- Convenient single-serve and blended seed products
- Food-grade processing investment near Central Asian production

> 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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