

Global Rapeseed 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 46.2 bn
Forecast (2031)	USD 61.3 bn
CAGR (2021–2031)	4.8%
Study period	2021–2031
Largest region	Asia-Pacific · 40%
Fastest-growing region	Asia-Pacific · 6.2%
Market concentration	Low
Licence	Individual / Company

The global rapeseed market reaches USD XXX billion in 2025 and advances to USD XXX billion by 2031, expanding at a XX% CAGR, according to shev.io Research. Food-oil demand provides the consumption foundation, while renewable diesel and other biofuel applications strengthen competition for commercially available seed. Asia-Pacific accounts for XX% of market value, supported by China's crushing industry and established consumption across South Asia. This report connects seed production, cross-border trade, crushing economics and regulatory change to identify where processors, traders and agricultural suppliers can capture profitable growth.

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Executive summary

The global rapeseed market reaches USD XXX billion in 2025 and advances to USD XXX billion by 2031, expanding at a XX% CAGR, according to shev.io Research. Food-oil demand provides the consumption foundation, while renewable diesel and other biofuel applications strengthen competition for commercially available seed. Asia-Pacific accounts for XX% of market value, supported by China's crushing industry and established consumption across South Asia. This report connects seed production, cross-border trade, crushing economics and regulatory change to identify where processors, traders and agricultural suppliers can capture profitable growth.

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

Key findings

- shev.io Research places global rapeseed market value at USD XXX billion in 2025 and USD XXX billion in 2031.
- Market value expands at a XX% CAGR over 2025–2031, adding USD XXX billion in annual sales.
- Asia-Pacific represents XX% of base-year market value, equivalent to USD XXX billion.
- Europe represents XX% of base-year market value, equivalent to USD XXX billion.
- Asia-Pacific records the fastest regional value growth at XX% annually through 2031.
- Standard low-erucic rapeseed and canola account for XX% of market value; specialty high-oleic low-erucic grades contribute XX%.
- Seed allocated to crushing for food-oil markets represents XX% of market value, while crushing for fuel-oil markets contributes XX%.
- Trader- and cooperative-mediated procurement accounts for XX% of first-sale market value.

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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 Rapeseed Market Trends and Growth Drivers

Rapeseed economics connect farm production to two major coproduct markets. Crushers buy seed against expected oil and meal realisation, so changes in edible-oil demand, renewable-fuel margins or feed-protein prices can all alter procurement behaviour. A market assessment centred only on harvested tonnage misses the commercial mechanism that determines seed value and plant utilisation.

The geographic separation between production and consumption creates opportunities for traders and processors with reliable logistics. Canada and Australia provide internationally traded supply, while large processing markets depend on a combination of domestic harvests and imports. Trade measures, freight conditions and quality requirements determine whether available seed can reach the highest-value outlet.

Growth therefore rests on both demand expansion and supply-chain execution. Specialty specifications, documented production practices and dependable deliveries can support premiums, but additional processing capacity requires commercially accessible seed. The report evaluates these mechanisms together rather than treating capacity announcements as equivalent to realised consumption.

Growth drivers

Renewable-fuel feedstock demand

Renewable diesel and biodiesel producers increase demand for rapeseed oil when feedstock eligibility and lifecycle performance support attractive compliance economics. The resulting oil premium raises the value crushers can pay for seed, particularly in export-connected production regions. Demand depends on operating utilisation and policy treatment as well as installed fuel-production capacity.

Food-oil demand and reformulation

Rapeseed oil serves household cooking, foodservice and industrial food manufacturing because of its functional versatility and fatty-acid profile. Population growth, organised food processing and reformulation sustain demand even when fuel markets fluctuate. Standard grades provide scale, while high-oleic grades address applications requiring greater oxidative stability.

Expansion of regional crushing capacity

Investment in processing capacity increases competition for locally available seed and gives growers additional routes to market. Processors that combine efficient plants with storage, rail access and established customer contracts are better positioned to maintain utilisation. Expansion also shifts trade from unprocessed seed toward oil and meal, changing the location of value capture.

Specialty contracts improve seed value

High-oleic, non-GM and other identity-preserved supply programmes allow processors to sell against differentiated customer requirements. Contract premiums reward farmers and handlers for segregation, documentation and consistent quality. These programmes increase average seed value where the downstream premium exceeds added production and logistics costs.

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Meal demand supports crushing economics

Rapeseed meal provides an established protein ingredient for livestock feed, with particular relevance to dairy and other ruminant systems. Strong meal realisation offsets part of the seed purchase cost and helps processors remain competitive when oil prices soften. Feed formulation, digestibility and competition with soybean meal determine the strength of this support.

Agronomic resilience improves commercial supply

Crop breeding, better establishment practices and targeted crop protection improve the reliability of marketable output. More stable yields support contract fulfilment and reduce the procurement risk associated with new processing capacity. Adoption is most valuable where drought, winter damage or pest pressure frequently interrupts supply.

Restraints

Weather volatility destabilises harvests

Drought, heat during flowering, excessive rainfall and winterkill can reduce seed availability and oil content within a single season. Processors face higher procurement costs and lower utilisation when regional harvests disappoint. Higher seed prices may temporarily lift nominal sales value while weakening physical demand and margins.

Trade restrictions disrupt destination markets

Tariffs, phytosanitary restrictions and trade-remedy investigations can redirect seed, oil and meal flows abruptly. Export-oriented growers and processors face wider basis risk when a major destination becomes less accessible. Alternative outlets absorb displaced supply only when quality requirements, freight economics and commercial relationships align.

Competing oils limit pricing power

Food manufacturers and fuel producers compare rapeseed oil with soybean oil, palm oil, sunflower oil and eligible waste-derived feedstocks. A sustained rapeseed premium encourages substitution where technical specifications allow it. Policy preferences for particular feedstocks can further weaken the connection between total renewable-fuel growth and rapeseed demand.

Input costs and compliance pressure margins

Fertiliser, energy, crop protection and financing costs influence farmers' planting decisions and processors' operating returns. Traceability and sustainability requirements add documentation and verification expenses across the supply chain. Smaller operators are particularly exposed when these costs cannot be recovered through differentiated contracts.

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Rapeseed Market Driver and Restraint Impact on Growth

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Renewable-fuel feedstock demand	XXX	XXX	XXX
Food-oil demand and reformulation	XXX	XXX	XXX
Expansion of regional crushing capacity	XXX	XXX	XXX
Specialty contracts improve seed value	XXX	XXX	XXX
Meal demand supports crushing economics	XXX	XXX	XXX
Agronomic resilience improves commercial supply	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Weather volatility destabilises harvests	XXX	XXX	XXX
Trade restrictions disrupt destination markets	XXX	XXX	XXX
Competing oils limit pricing power	XXX	XXX	XXX
Input costs and compliance pressure margins	XXX	XXX	XXX

Source: XXX

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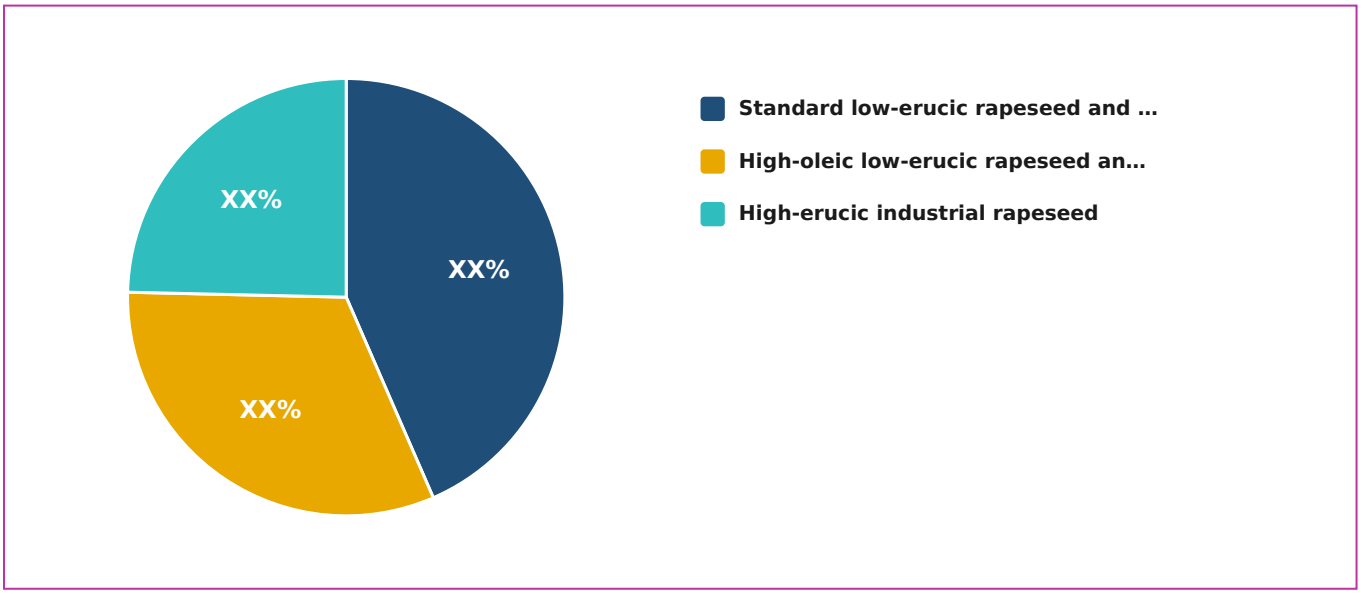
Rapeseed Market Segmentation by Seed Grade, Production System and End Use

By Seed Grade

Standard low-erucic grades dominate because they serve the broadest food-oil, meal and fuel supply chains. High-oleic low-erucic grades command differentiated contracts where customers value frying stability and specific oil functionality. High-erucic grades serve specialised industrial outlets and are analysed separately from edible canola-quality seed.

Value share by seed Grade, 2025



Source: XXX

Value by seed Grade, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Standard low-erucic rapeseed and canola	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
High-oleic low-erucic rapeseed and canola	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
High-erucic industrial rapeseed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Production System

Production-system economics reflect regional crop approvals, seed technology and destination-market requirements. Conventional non-GM supply benefits from established demand in markets that require segregation, while genetically modified canola remains important in major exporting systems. Certified organic seed occupies a premium niche and is classified separately to keep categories mutually exclusive.

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Value by production System, USD bn

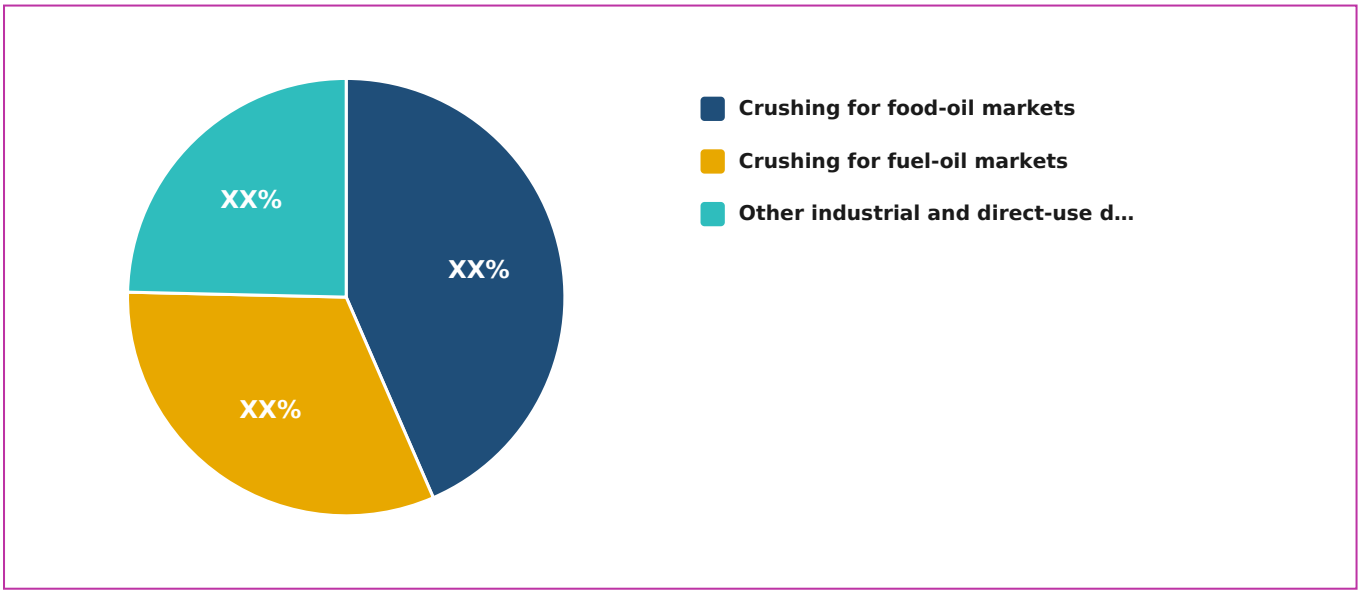
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional non-GM	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Genetically modified	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Certified organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Primary Processing Destination

Food-oriented crushing remains the largest destination, supported by household, foodservice and food-manufacturing consumption. Fuel-oriented crushing provides a substantial competing outlet and responds more directly to compliance economics and feedstock substitution. Seed is allocated according to the primary destination of its resulting oil; associated meal remains a coproduct and does not create an additional seed-market category.

Value share by primary Processing Destination, 2025



Source: XXX

Value by primary Processing Destination, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Crushing for food-oil markets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Crushing for fuel-oil markets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other industrial and direct-use destinations	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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By Procurement Channel

Traders and cooperatives aggregate dispersed farm supply, provide storage and manage quality and delivery requirements. Direct processor procurement is strongest where crushing plants maintain established grower catchments and contract programmes. Each seed lot is classified by its first commercial buyer, ensuring that subsequent resale does not inflate channel totals.

Value by procurement Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Traders and cooperatives	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Direct processor procurement	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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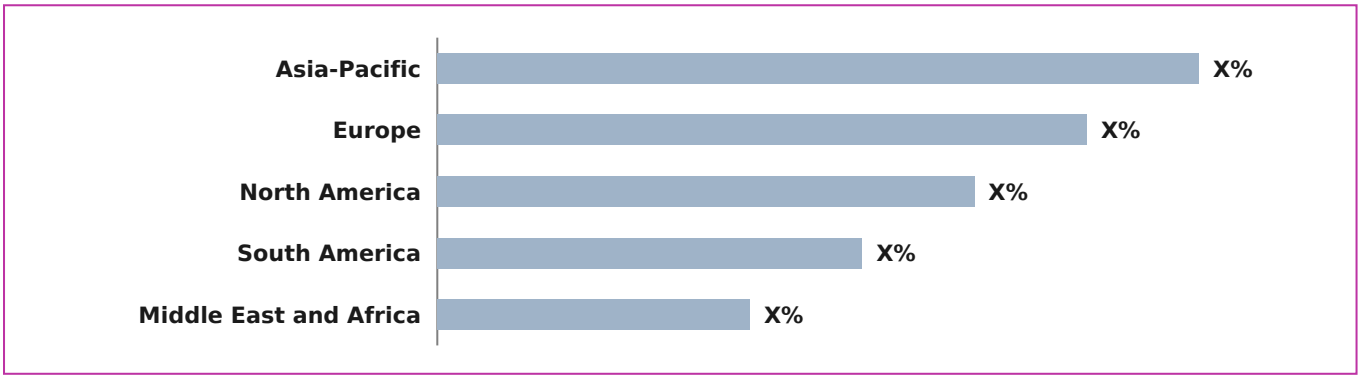
Rapeseed Market Regional Analysis and Country Outlook

Asia-Pacific accounts for XX% of market value and delivers the fastest regional growth at XX% annually. China's large processing sector connects international seed availability to domestic food-oil and protein-meal demand. India requires a separate statistical treatment because published rapeseed-and-mustard aggregates extend beyond the report's commodity definition; qualifying rapeseed is isolated before market sizing. Japan remains an important import-dependent processing market, while Australia combines export-oriented production with growing interest in domestic processing.

Europe contributes XX% of market value, supported by established crushing assets, food-oil consumption and biodiesel demand. Germany, France and Poland anchor the European Union's production and processing network, while the United Kingdom represents a distinct policy and import environment. Russia and Ukraine influence regional export availability, freight choices and procurement risk. The analysis separates the European Union's regulatory framework from the wider European market and assigns Russia consistently to Europe.

North America accounts for XX% of consumption-destination value, with Canada's importance as a production and export origin exceeding its share of domestic seed use. Canadian crushing investment increases the strategic importance of seed origination, rail access and oil-and-meal offtake. South America and the Middle East and Africa represent smaller consumption pools, where growth depends on selective processing investment, crop suitability and import economics rather than broad-based scale.

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
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
South 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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Rapeseed Market Competitive Landscape and Company Share

The overall rapeseed market has low concentration because agricultural production and first-sale origination are distributed across many farms, cooperatives and regional merchants. Concentration is substantially higher within particular export corridors and crushing catchments. ADM, Bunge, Cargill, COFCO International, Louis Dreyfus Company and Wilmar International compete through combinations of procurement networks, processing assets, logistics and downstream customer access.

Specialist regional operators remain influential. Richardson International, AGT Food and Ingredients through its ownership of Ceres Global, CHS, Avril and GrainCorp illustrate the importance of regional relationships and infrastructure. Company-share analysis uses first-purchase seed value and reconciles internal transfers to avoid counting the same seed repeatedly. Viterra is treated within Bunge following completion of their combination in July 2025, while historical disclosures retain the ownership structure applicable to each reporting year.

Competitive advantage increasingly depends on linking seed quality and traceability to profitable oil-and-meal outlets. Large processors can spread compliance and logistics costs across wider networks, while regional businesses can differentiate through grower relationships and specialty contracts. The company profiles evaluate procurement reach, relevant processing assets, downstream exposure and disclosed investment programmes without treating diversified group revenue as rapeseed-market revenue.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
ADM	XXX	XXX	XXX	XXX
Bunge	XXX	XXX	XXX	XXX
Cargill	XXX	XXX	XXX	XXX
COFCO International	XXX	XXX	XXX	XXX
Louis Dreyfus Company	XXX	XXX	XXX	XXX
Wilmar International	XXX	XXX	XXX	XXX
Richardson International	XXX	XXX	XXX	XXX
CHS	XXX	XXX	XXX	XXX
Avril	XXX	XXX	XXX	XXX
GrainCorp	XXX	XXX	XXX	XXX

Source: XXX

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Rapeseed Market Forecast and Investment Opportunities

The market reaches USD XXX billion by 2031, with food demand sustaining the core consumption base and fuel applications influencing incremental oil demand and procurement competition. Asia-Pacific contributes the strongest regional expansion, while European and North American operators focus on feedstock security, asset utilisation and product realisation. Market value rises through a combination of commercial seed demand, quality premiums and nominal pricing.

The upside scenario combines reliable harvests, stronger processing utilisation and supportive treatment of rapeseed-derived fuel pathways. The downside scenario combines trade friction, substitution toward competing oils and weak crushing margins. The report's scenario framework varies these inputs separately so that readers can distinguish a high-price, low-volume environment from durable consumption growth.

Successful investment strategies secure seed supply and downstream offtake together. Specialty contracts, documented farm practices and flexible oil-and-meal marketing offer routes to improved returns, but their economics depend on local execution. The most attractive projects connect credible grower procurement with processing efficiency and access to more than one end market.

Opportunities

- Identity-preserved high-oleic seed contracts
- Low-carbon-intensity feedstock origination
- Flexible crushing assets serving food and fuel customers
- Rapeseed-meal upgrading and specialised feed applications
- Regional storage and export-logistics optimisation
- Traceability services linking farm practices to processor requirements

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