



# Global Rice Bran Oil Market

Market size, segmentation, competitive landscape and outlook

2021-2031

## Moving forward, together

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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 6.2 bn           |
| Forecast (2031)        | USD 9.3 bn           |
| CAGR (2021-2031)       | 7%                   |
| Study period           | 2021-2031            |
| Largest region         | Asia-Pacific · 78%   |
| Fastest-growing region | North America · 8.8% |
| Market concentration   | Low                  |
| Licence                | Individual / Company |

The global rice bran oil market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific commands XX% of market value through its concentration of rice milling, solvent extraction and household consumption, while North America is the fastest-growing region at an XX% CAGR. Refined rice bran oil remains the commercial core, although cold-pressed products, functional-food ingredients and high-oryzanol formulations are creating higher-margin growth pools. The report quantifies market value, volume, pricing, segment shares, country demand, processing economics and company positioning across the 2021–2031 study period.

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## Executive summary

The global rice bran oil market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific commands XX% of market value through its concentration of rice milling, solvent extraction and household consumption, while North America is the fastest-growing region at an XX% CAGR. Refined rice bran oil remains the commercial core, although cold-pressed products, functional-food ingredients and high-oryzanol formulations are creating higher-margin growth pools. The report quantifies market value, volume, pricing, segment shares, country demand, processing economics and company positioning across the 2021-2031 study period.

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

## Key findings

- Global rice bran oil sales reached USD XXX billion and XXX tonnes in 2025.
- The market will add USD XXX billion between 2025 and 2031, reaching USD XXX billion at a XX% CAGR.
- Asia-Pacific generated XX% of 2025 revenue, supported by integrated rice-milling and refining systems in India, China, Japan and Thailand.
- Refined rice bran oil represented XX% of market value in 2025 and remains the principal format for household frying and industrial food processing.
- Household cooking accounted for XX% of demand, while nutraceuticals, cosmetics and pharmaceutical applications will grow fastest at a XX% CAGR.
- PET bottles held XX% of packaged and bulk market value; bulk tankers and flexitanks represented XX% through food-manufacturing and export demand.
- North America will expand at an XX% CAGR as natural-channel brands and food formulators adopt neutral-tasting, non-GMO-positioned specialty oils.
- Commercial rice bran generally contains 15-XX% oil, making rapid stabilization and extraction yield the central determinants of processor economics.

## 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

## Global Rice Bran Oil Market Trends and Growth Drivers

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Rice bran oil occupies a distinctive position between commodity cooking oils and functional premium oils. Its supply begins with a low-value milling residue, yet commercial success depends on rapid stabilization, disciplined extraction and sophisticated refining. This creates a market in which procurement density and plant location are as important as brand strength.

Demand is broadening beyond its traditional Asian household base. Packaged-food manufacturers value neutral flavor and frying stability, while natural-channel consumers and formulators seek gamma-oryzanol, tocopherols, tocotrienols and phytosterols. These attributes support a widening price ladder from bulk crude oil to traceable cold-pressed and functional grades.

The central competitive tension is between rice bran oil's differentiated nutritional story and the price liquidity of palm, soybean and sunflower oils. Processors that protect extraction yields, recover co-products and sell into multiple channels can remain competitive through commodity cycles while preserving premiums for branded and high-specification products.

### Growth drivers

#### Health-positioned cooking oil adoption

Rice bran oil is moving from a regional by-product oil into a premium everyday-cooking proposition built around balanced fatty acids, gamma-oryzanol and frying performance. Branded suppliers are converting health awareness into repeat household purchases, particularly among urban middle-income consumers in India, China and Southeast Asia.

#### Rice-milling by-product valorization

Large rice-producing economies are seeking higher returns from bran that was historically directed to low-value feed uses. Co-location of stabilization and extraction with modern mills improves oil recovery, reduces transport losses and creates additional revenue from de-oiled bran, wax and fatty-acid streams.

#### Processed-food and foodservice expansion

Snack, bakery and foodservice operators value rice bran oil for its neutral flavor and suitability for high-temperature applications. Expansion of organized quick-service restaurants and packaged-food manufacturing increases demand for standardized bulk grades and strengthens refinery utilization.

#### Premium cold-pressed product growth

Cold-pressed products are gaining space in natural-food stores, specialty e-commerce and premium grocery assortments. Smaller pack sizes, provenance claims and minimally processed positioning lift revenue per litre and enable regional processors to move beyond commodity pricing.

#### Functional ingredient commercialization

Nutraceutical and personal-care formulators are expanding the use of rice bran oil and its unsaponifiable fraction in capsules, emulsions, skin-care oils and functional foods. Demand centers on controlled gamma-oryzanol, tocopherol, tocotrienol and phytosterol specifications rather than commodity edible-oil pricing.

### **Digital and modern retail access**

E-commerce reduces the distribution disadvantage faced by specialist rice bran oil brands and gives suppliers direct access to health-oriented consumers. Modern retail also improves shelf visibility, supports educational packaging and enables differentiated one-litre and premium glass formats.

## **Restraints**

### **Bran instability and collection losses**

Native lipase rapidly raises free fatty acid levels after milling unless bran is stabilized or extracted promptly. Dispersed rice mills, unreliable collection routes and warm climates reduce recoverable edible-grade oil and raise neutralization losses.

### **Commodity-oil price competition**

Palm, soybean and sunflower oils possess deeper international trading markets and frequently undercut rice bran oil in price-sensitive household and foodservice channels. A wide premium can trigger substitution, especially where buyers attach limited value to functional differentiation.

### **Refining and contaminant-control burden**

Producers serving demanding export markets must control pesticide residues, polycyclic aromatic hydrocarbons, 3-MCPD esters and glycidyl esters while retaining desirable unsaponifiables. Advanced physical refining, testing and traceability add capital and operating costs that disadvantage small refiners.

### **Low awareness beyond core markets**

Rice bran oil remains unfamiliar to many consumers in Europe, the Americas, the Middle East and Africa. Limited shelf presence and the need to explain extraction, flavor and health attributes increase customer-acquisition costs for new brands.

# Rice Bran Oil Market Driver and Restraint Impact on the Forecast

## Drivers — impact on forecast

| Driver                                   | Impact on CAGR | Geography | Horizon |
|------------------------------------------|----------------|-----------|---------|
| Health-positioned cooking oil adoption   | XXX            | XXX       | XXX     |
| Rice-milling by-product valorization     | XXX            | XXX       | XXX     |
| Processed-food and foodservice expansion | XXX            | XXX       | XXX     |
| Premium cold-pressed product growth      | XXX            | XXX       | XXX     |
| Functional ingredient commercialization  | XXX            | XXX       | XXX     |
| Digital and modern retail access         | XXX            | XXX       | XXX     |

Source: XXX

## Restraints — impact on forecast

| Restraint                               | Impact on CAGR | Geography | Horizon |
|-----------------------------------------|----------------|-----------|---------|
| Bran instability and collection losses  | XXX            | XXX       | XXX     |
| Commodity-oil price competition         | XXX            | XXX       | XXX     |
| Refining and contaminant-control burden | XXX            | XXX       | XXX     |
| Low awareness beyond core markets       | XXX            | XXX       | XXX     |

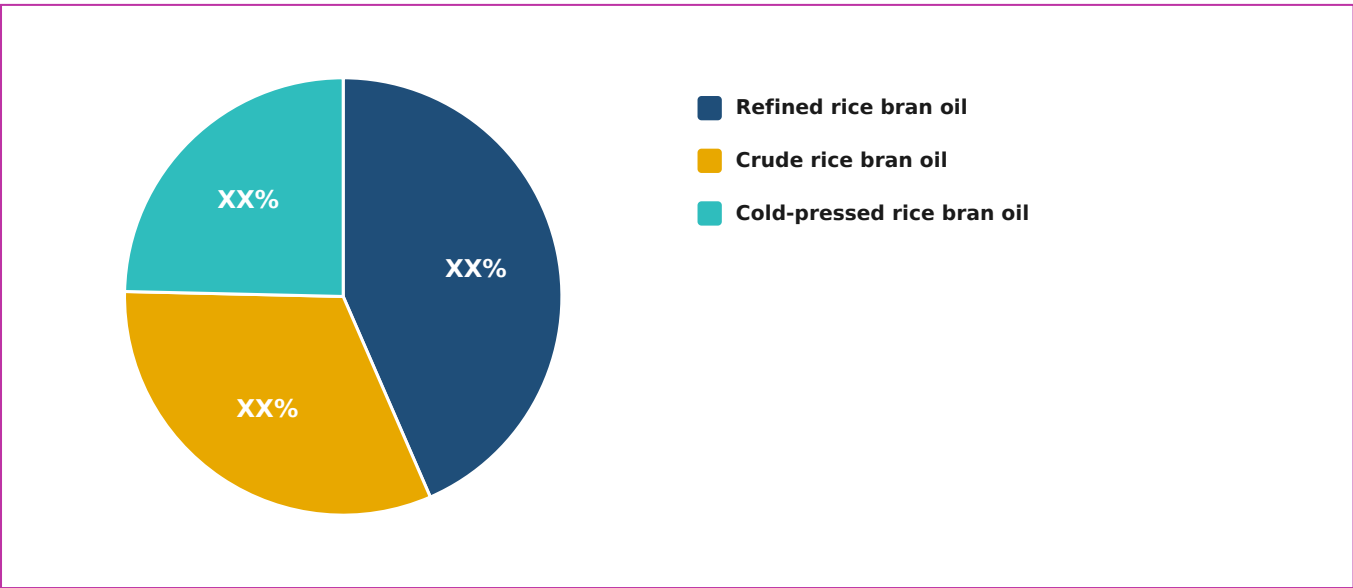
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# Rice Bran Oil Market Segmentation by Product, Application, Packaging and Channel

## By Product Type

Refined oil dominates household, foodservice and food-manufacturing demand because deodorization, color control and consistent oxidative performance support broad culinary use. Crude oil primarily enters refinery supply chains and selected industrial applications. Cold-pressed oil is expanding from a narrow specialty base through direct-to-consumer brands, premium grocery and demand for minimally processed products.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

| Segment                    | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|----------------------------|------|------|------|------|------|------|------------|------|
| Refined rice bran oil      | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Crude rice bran oil        | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Cold-pressed rice bran oil | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |

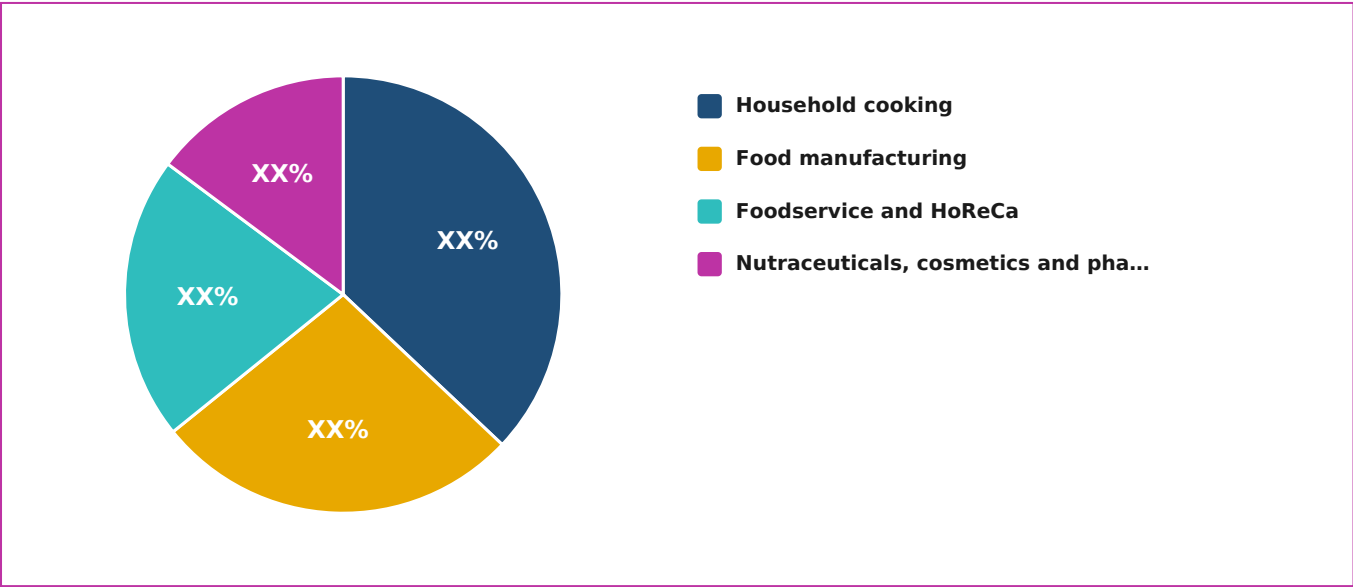
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## By Application

Household cooking is the largest application because branded rice bran oil is established as an everyday frying and sautéing oil in major Asian markets. Food manufacturing represents the second-largest pool, led by snacks, bakery products, sauces and prepared foods. Nutraceutical, cosmetic and pharmaceutical

demand grows fastest as buyers seek gamma-oryzanol-rich oil and controlled unsaponifiable specifications.

Value share by application, 2025



Source: XXX

Value by application, USD bn

| Segment                                       | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|-----------------------------------------------|------|------|------|------|------|------|------------|------|
| Household cooking                             | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Food manufacturing                            | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Foodservice and HoReCa                        | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Nutraceuticals, cosmetics and pharmaceuticals | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |

Source: XXX

By Packaging

PET bottles lead through their balance of visibility, handling efficiency and compatibility with one- to five-litre retail formats. Pouches are critical to entry-price packs and household refill behavior in South Asia. Bulk tankers, drums and flexitanks serve processors and foodservice customers, while glass and premium containers gain from cold-pressed oils and gifting-oriented products.

**Value by packaging, USD bn**

| Segment                            | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|------------------------------------|------|------|------|------|------|------|------------|------|
| PET bottles and jars               | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Flexible pouches                   | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Metal tins and cans                | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Glass and premium containers       | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Bulk tankers, drums and flexitanks | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |

Source: XXX

**By Distribution Channel**

Traditional grocery leads because the market remains concentrated in Asian economies with dense independent retail networks. Supermarkets and hypermarkets provide the principal platform for national brands, premium packs and promotional comparison. E-commerce grows fastest by extending specialist products beyond core cities, while direct industrial supply accounts for large-volume contracts with food manufacturers.

**Value by distribution Channel, USD bn**

| Segment                             | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|-------------------------------------|------|------|------|------|------|------|------------|------|
| Traditional grocery                 | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Supermarkets and hypermarkets       | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| E-commerce                          | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Foodservice distributors            | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Direct industrial and institutional | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |

Source: XXX

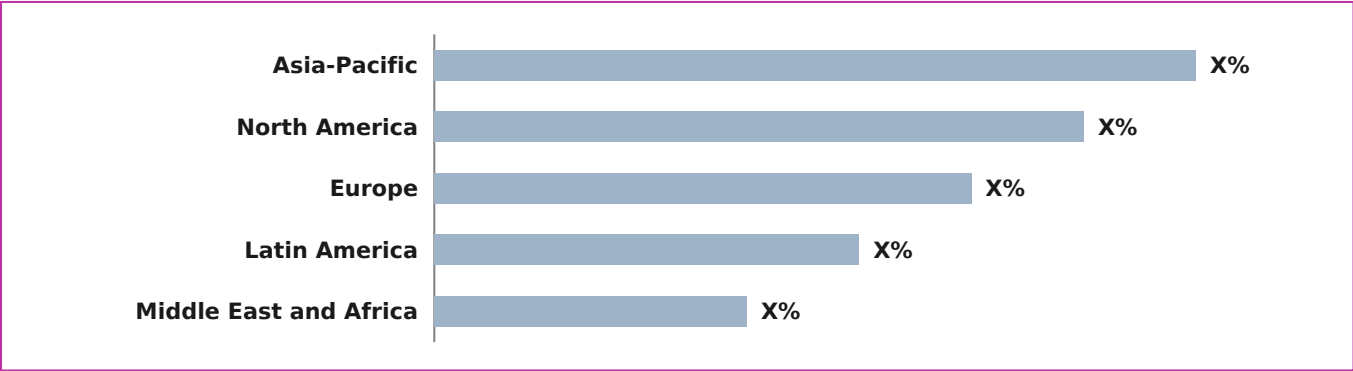
# Rice Bran Oil Market Regional Analysis and Country Outlook

Asia-Pacific generated USD XXX billion in 2025, equal to XX% of global market value. India leads regional volume through its extensive paddy-milling base, established solvent-extraction industry and broad household acceptance, while China combines large-scale edible-oil processing with strong branded portfolios led by Yihai Kerry Arawana. Japan sustains a mature premium market built around domestic rice provenance, high-quality refining and food-manufacturing applications.

Southeast Asia is the region's export-oriented growth corridor. Thailand is developing integrated businesses that connect milling, bran stabilization, extraction, refining and biomass energy, while Vietnam has significant upside as modern rice mills improve bran recovery. Fragmented collection and competition for bran from feed users continue to determine the speed at which theoretical oil potential becomes marketable output.

North America is the fastest-growing region at an XX% CAGR, driven by natural retail, specialty e-commerce and food formulators seeking neutral-tasting oils with non-GMO and allergen-management advantages. Europe grows from a smaller base under strict contaminant and traceability requirements, whereas Latin America benefits from Brazil's established rice-processing clusters. Middle East and Africa demand is led by imported packaged oil, foodservice trials and localized extraction opportunities in major rice-producing countries.

## Growth rate by region, 2025-2031



Source: XXX

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  |
| North America          | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Europe                 | 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

## Rice Bran Oil Market Competitive Landscape and Company Share

The global rice bran oil market is fragmented: the ten largest suppliers represented XX% of 2025 revenue. Competition is national and regional because fresh-bran economics favor facilities close to rice mills, while retail leadership depends on local distribution, brand investment and pack-price architecture. Integrated groups capture additional margin from de-oiled bran, wax, fatty-acid distillates and functional ingredients.

Yihai Kerry Arawana, AWL Agri Business, Ricela Group, Tsuno Food Industrial, King Rice Oil Group and Wilmar-linked regional businesses form the leading strategic set. Their advantages differ: some control branded edible-oil distribution, some operate dense bran procurement networks, and Japanese specialists differentiate through food ingredients, gamma-oryzanol and high-specification refining.

Capacity investment is moving toward integrated milling and extraction sites, continuous stabilization and lower-contaminant physical refining. Consolidation will remain selective because bran sourcing is local, but acquisitions of rice mills and extraction assets provide immediate feedstock access. Export-oriented suppliers are prioritizing traceability, private-label packing, flexible small formats and bulk flexitank capability.

### Leading companies

| Company                                | HQ  | Est. revenue 2025 | Market share 2025 | YoY |
|----------------------------------------|-----|-------------------|-------------------|-----|
| Yihai Kerry Arawana Holdings Co., Ltd. | XXX | XXX               | XXX               | XXX |
| AWL Agri Business Limited              | XXX | XXX               | XXX               | XXX |
| A.P. Organics Limited (Ricela Group)   | XXX | XXX               | XXX               | XXX |
| Tsuno Food Industrial Co., Ltd.        | XXX | XXX               | XXX               | XXX |
| King Rice Oil Group                    | XXX | XXX               | XXX               | XXX |
| Jaikao Corporation Co., Ltd.           | XXX | XXX               | XXX               | XXX |
| Oryza Oil & Fat Chemical Co., Ltd.     | XXX | XXX               | XXX               | XXX |
| Sanwa Yushi Co., Ltd.                  | XXX | XXX               | XXX               | XXX |
| Emami Agrotech Limited                 | XXX | XXX               | XXX               | XXX |
| Marico Limited                         | XXX | XXX               | XXX               | XXX |
| Cargill India Private Limited          | XXX | XXX               | XXX               | XXX |
| Ramdevbaba Solvent Limited             | XXX | XXX               | XXX               | XXX |

Source: XXX

# Rice Bran Oil Market Forecast and Commercial Opportunities

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The market will reach USD XXX billion and XXX tonnes by 2031. Revenue growth will outpace volume as premium cold-pressed products, high-oryzanol specifications, smaller branded packs and stricter refining requirements lift the average realized price. Refined oil will retain scale leadership, but its share will ease as specialty grades expand.

The base-case forecast assumes continued growth in Asian packaged-oil consumption, improved bran stabilization and manageable spreads against sunflower and soybean oils. An accelerated scenario emerges if integrated mills capture more fresh bran and functional claims broaden consumer adoption; the downside scenario centers on persistent commodity-oil discounts and weak de-oiled-bran credits.

The strongest returns will accrue to processors that control feedstock radius, monetize every refining co-product and tailor specifications by channel. Consumer brands need health communication and accessible pack prices, while business-to-business suppliers will win through consistent color, odor, oxidative stability, contaminant control and documented chain of custody.

## Opportunities

- Cold-pressed and minimally processed premium oils
- High-oryzanol nutraceutical and functional-food ingredients
- Private-label retail supply in North America and Europe
- Integrated extraction plants adjacent to large rice mills
- Traceable and low-carbon oil from circular rice-processing systems
- Foodservice blends engineered for frying stability
- Recovery of wax, phytosterols and gamma-oryzanol from refining streams

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.