

Global Soybean Oil 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

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

Indicator	Value
Market size (2024)	USD 56.8 bn
Forecast (2031)	USD 80.4 bn
CAGR (2021-2031)	5.1%
Study period	2021-2031
Largest region	Asia-Pacific · 41.5%
Fastest-growing region	North America · 6.2%
Market concentration	Moderate
Licence	Individual / Company

The global soybean oil market reached USD XXX billion in 2024 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. USDA records global production of XXX metric tons in 2024/25, with China, the United States, Brazil and Argentina controlling the principal crushing and refining corridors. Food manufacturing remains the largest demand pool, while renewable diesel, biodiesel and sustainable aviation fuel feedstocks provide the strongest incremental value opportunity. Capacity additions, traceable sourcing, competing vegetable-oil economics and biofuel policy will determine regional margins through 2031.

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Executive summary

The global soybean oil market reached USD XXX billion in 2024 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. USDA records global production of XXX metric tons in 2024/25, with China, the United States, Brazil and Argentina controlling the principal crushing and refining corridors. Food manufacturing remains the largest demand pool, while renewable diesel, biodiesel and sustainable aviation fuel feedstocks provide the strongest incremental value opportunity. Capacity additions, traceable sourcing, competing vegetable-oil economics and biofuel policy will determine regional margins through 2031.

Indicator	Value
Market size 2024	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global soybean oil market generated USD XXX billion in 2024 and will reach USD XXX billion by 2031.
- USDA reported global soybean oil production of XXX metric tons in 2024/25, XX% above 2023/24.
- China produced XXX metric tons of soybean oil in 2024/25, equivalent to XX% of global output.
- The United States produced XXX metric tons in 2024/25, while Brazil produced XXX metric tons.
- Asia-Pacific accounted for XX% of market value in 2024, supported by China's crushing base and India's edible-oil demand.
- Food applications represented XX% of 2024 market value, while biofuels accounted for XX%.
- USDA projected XXX pounds of US soybean oil use in biomass-based diesel production during 2025/26.
- Refined soybean oil represented XX% of 2024 market value and will retain leadership through 2031.

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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 Soybean Oil Market Trends and Growth Drivers

Soybean oil has moved from a predominantly food-led commodity into a market jointly priced by food, feed and energy systems. Crushers balance soybean costs against the combined value of oil, meal and hulls, while refiners allocate oil among edible, industrial and renewable-fuel customers according to location, specification and policy value.

The strongest structural change is the expansion of biomass-based diesel demand in North America. It raises oil's contribution to crush economics, supports new processing assets and creates regional competition between food and fuel buyers. In Asia, demand remains anchored by food consumption and crushing decisions linked to animal-feed requirements.

Margin leadership will depend on procurement reach, operational flexibility and traceability. Integrated companies can shift volumes across applications and regions, while specialty suppliers capture premiums through high-oleic, non-GM, identity-preserved and lower-carbon products.

Growth drivers

Renewable diesel creates a structural demand floor

Renewable diesel and biodiesel plants compete directly with food refiners for soybean oil, strengthening basis values near fuel-production clusters. US federal obligations and state low-carbon fuel programs reward scalable domestic feedstocks, directing additional crush investment toward regions with efficient rail and pipeline access.

Rising processed-food consumption expands edible-oil use

Urbanization, household income growth and modern retail increase demand for frying oils, bakery fats, mayonnaise and packaged convenience foods. The effect is strongest in Asia-Pacific, Latin America, the Middle East and Africa, where per-capita consumption and organized foodservice penetration continue to rise.

New crushing capacity improves regional availability

Plants in the United States and South America are expanding soybean-oil supply close to farms and renewable-fuel customers. Higher crush volumes also improve procurement options for food processors, although the accompanying meal output requires disciplined feed-market placement.

High-oleic oil gains premium applications

High-oleic soybean oil offers oxidative stability, longer fry life and lower saturated fat without partial hydrogenation. Contract production and identity-preserved procurement support adoption in foodservice, snacks, bakery products and selected industrial lubricants.

Foodservice formalization lifts bulk demand

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Quick-service restaurants, institutional kitchens and hospitality operators purchase standardized bulk oils with consistent performance and food-safety documentation. Distributor consolidation and cold-chain investment extend formal foodservice demand beyond major metropolitan areas.

Integrated logistics strengthen export flows

Port terminals, barge fleets, rail assets and destination storage reduce delivered costs and protect utilization rates during crop surpluses. Argentina and Brazil benefit from export-oriented crushing systems, while global merchants can redirect oil between food, fuel and industrial customers.

Restraints

Competing oils cap price realization

Palm, sunflower and rapeseed oils can replace soybean oil across many frying, blending and fuel applications. Buyers reformulate rapidly when relative prices move, limiting suppliers' ability to pass through soybean or energy-cost inflation.

Commodity volatility compresses processor margins

Weather, currency movements, trade restrictions and speculative positioning can shift soybean and oil prices faster than contracted selling prices. Crushers without coordinated meal-and-oil hedging face pronounced swings in crush margin and working-capital requirements.

Traceability raises market-access costs

Geolocation, chain-of-custody controls and supplier verification require investment across fragmented farm and intermediary networks. European due-diligence rules particularly affect exporters serving premium food and industrial customers.

Biofuel-policy changes redirect demand

Adjustments to renewable-fuel obligations, tax credits, carbon-intensity treatment or imported-feedstock eligibility can quickly alter refinery economics. The exposure is greatest where fuel demand accounts for a large share of domestic soybean-oil disappearance.

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Soybean Oil Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Renewable diesel creates a structural demand floor	XXX	XXX	XXX
Rising processed-food consumption expands edible-oil use	XXX	XXX	XXX
New crushing capacity improves regional availability	XXX	XXX	XXX
High-oleic oil gains premium applications	XXX	XXX	XXX
Foodservice formalization lifts bulk demand	XXX	XXX	XXX
Integrated logistics strengthen export flows	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Competing oils cap price realization	XXX	XXX	XXX
Commodity volatility compresses processor margins	XXX	XXX	XXX
Traceability raises market-access costs	XXX	XXX	XXX
Biofuel-policy changes redirect demand	XXX	XXX	XXX

Source: XXX

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Soybean Oil Market Segmentation Analysis

By Processing Type

Refined, bleached and deodorized oil dominates food manufacturing, foodservice and retail because it provides neutral flavor, consistent color and controlled quality. Crude and degummed oil retains a large role in export trade, biodiesel and integrated refining. Refined oil grows faster as emerging-market refining, packaged foods and specialty formulations expand.

Value by processing Type, USD bn

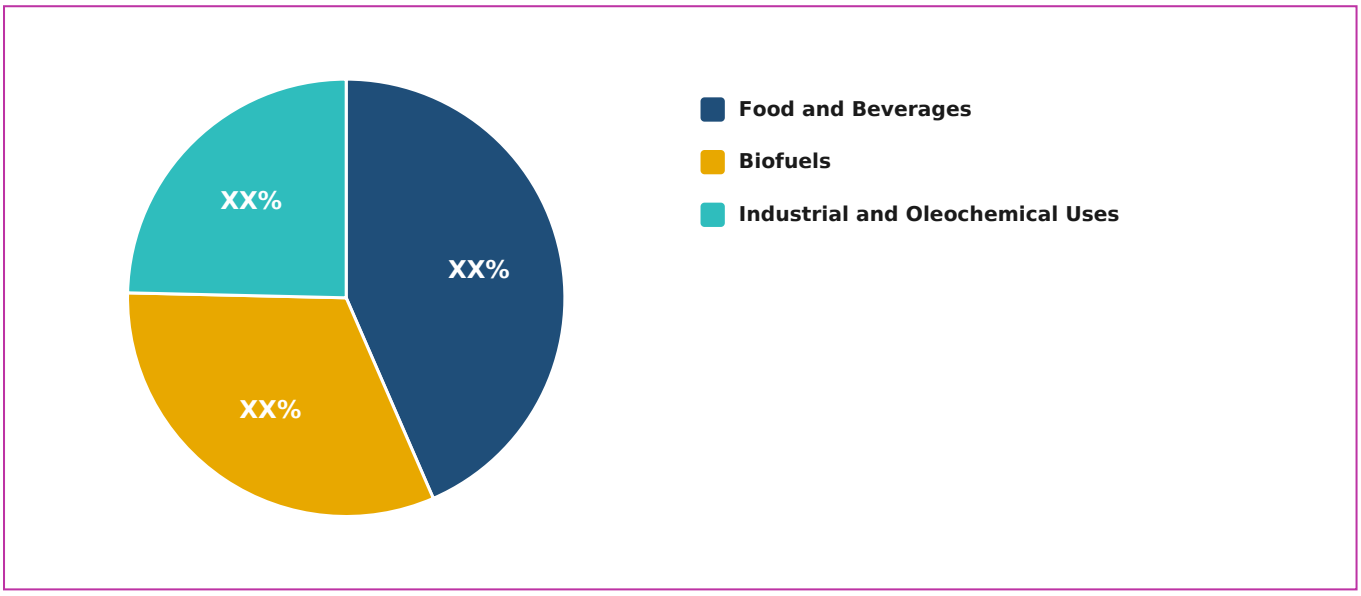
Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Refined Soybean Oil	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Crude and Degummed Soybean Oil	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Cooking, frying, bakery, dressings and processed foods form the market's demand base. Biofuels are the fastest-growing application at XX% annually as renewable diesel and biodiesel producers secure vegetable-oil feedstocks. Industrial uses expand through oleochemicals, lubricants, paints, inks and polymers but remain comparatively specialized.

Value share by application, 2024



Source: XXX

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Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Food and Beverages	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Biofuels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial and Oleochemical Uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End User

Industrial processors and renewable-fuel producers lead through large-volume contracts and direct procurement from crushers and refiners. Food manufacturers represent a diversified customer base spanning snacks, bakery, sauces and prepared foods. Foodservice grows faster than household retail as organized restaurant chains expand in emerging economies.

Value by end User, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Industrial Processors and Fuel Producers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food Manufacturers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice Operators	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Households	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Direct contracts dominate because fuel producers, food manufacturers and large distributors require bulk delivery, hedging and specification control. Wholesale distributors serve fragmented foodservice and regional industrial accounts. Retail channels remain important in India, China, Latin America and Africa, with modern grocery and e-commerce gaining share from traditional trade.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Direct and Bulk B2B	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wholesale and Foodservice Distribution	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Modern Retail and E-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Traditional Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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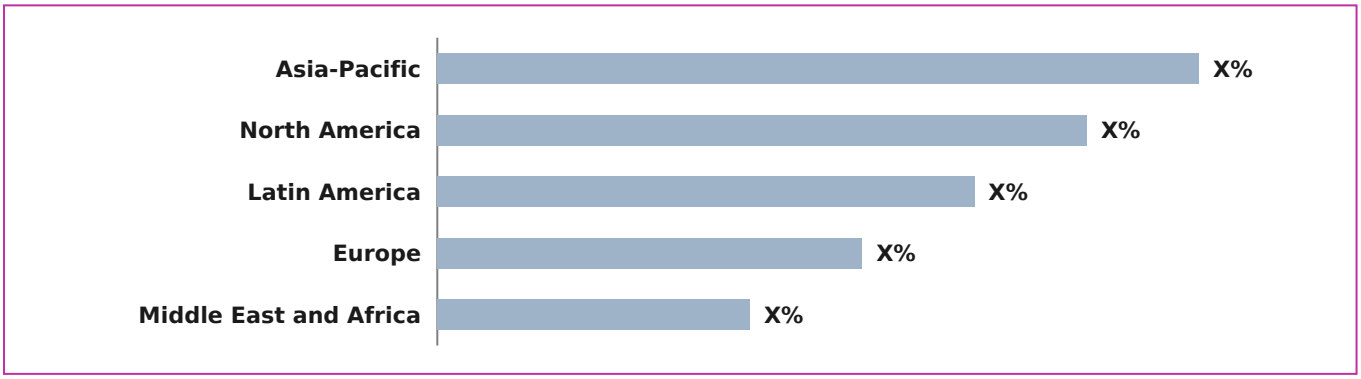
Soybean Oil Market Regional Analysis and Country Outlook

Asia-Pacific held XX% of global market value in 2024. China anchors the region through the world's largest soybean-crushing system and produced XXX metric tons of soybean oil in 2024/25, while India's structural edible-oil deficit sustains substantial import and refining activity. Palm-oil competition remains central to purchasing decisions, particularly in price-sensitive foodservice and household channels.

North America is the fastest-growing region at a XX% CAGR through 2031. US soybean-oil demand is increasingly connected to renewable diesel, biodiesel and sustainable aviation fuel economics; USDA projected XXX pounds for biomass-based diesel in 2025/26. New and expanded crushing assets in Ohio, North Dakota and Louisiana improve domestic feedstock availability and shorten supply chains to fuel customers.

Latin America combines a large agricultural surplus with globally competitive crushing and export infrastructure. Brazil's domestic biodiesel system absorbs a growing portion of oil production, while Argentina remains a pivotal export supplier through the Paraná and Atlantic port corridors. Europe prioritizes certified, traceable and non-GM supply, whereas Middle Eastern and African growth is led by population, food processing and import-dependent refining.

Growth rate by region, 2024-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
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
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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Market value by leading country, USD bn

Country	2024	2031	Share 2024	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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Soybean Oil Market Competitive Landscape and Company Share

The market is moderately concentrated at the global-trading and large-scale crushing level but fragmented in downstream refining, packaging and country-level distribution. Bunge, ADM, Cargill, Wilmar International and Louis Dreyfus Company combine origination, processing, merchandising and logistics, allowing them to optimize oil and meal exposure across regions.

Bunge completed its combination with Viterra in July 2025, strengthening its presence across major production and consumption corridors. Capacity investment is also reshaping North America: Louis Dreyfus Company's Upper Sandusky complex has XXX metric tons of annual soybean-crushing capacity and XXX metric tons of refined soybean-oil capacity, while Bunge Chevron Ag Renewables is developing a flexible Louisiana oilseed plant.

Competitive strategy is shifting toward low-carbon feedstocks, traceable sourcing, specialty edible oils and customer-specific blends. Scale remains important, but differentiation increasingly depends on carbon data, high-oleic supply, non-GM segregation, formulation support and reliable delivery to food and energy customers.

Leading companies

Company	HQ	Est. revenue 2024	Market share 2024	YoY
Bunge Global SA	XXX	XXX	XXX	XXX
Archer-Daniels-Midland Company	XXX	XXX	XXX	XXX
Cargill, Incorporated	XXX	XXX	XXX	XXX
Wilmar International Limited	XXX	XXX	XXX	XXX
Louis Dreyfus Company	XXX	XXX	XXX	XXX
COFCO International	XXX	XXX	XXX	XXX
CHS Inc.	XXX	XXX	XXX	XXX
AG Processing Inc.	XXX	XXX	XXX	XXX
Amaggi Group	XXX	XXX	XXX	XXX
Aceitera General Deheza	XXX	XXX	XXX	XXX

Source: XXX

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Soybean Oil Market Forecast and Commercial Opportunities

The market will add USD XXX billion between 2024 and 2031. Biofuels generate the fastest value growth, while food remains the largest and most resilient application. Additional soybean processing will keep physical supply expanding, but local premiums will persist where renewable-fuel capacity grows faster than crush and refining infrastructure.

The base-case forecast assumes continued global food-demand growth, expanding US renewable-fuel obligations, sustained Brazilian biodiesel blending and orderly commercialization of new crush capacity. A stronger-policy scenario would lift feedstock demand and prices, while rapid substitution toward waste oils or competing vegetable oils would reduce soybean oil's share of fuel-sector growth.

Winning suppliers will coordinate farm origination, certified traceability, oil-and-meal merchandising and end-user formulation. Assets positioned near soybean production, export terminals or renewable-fuel plants will capture the strongest utilization and logistics economics through 2031.

Opportunities

- Low-carbon-intensity soybean oil for renewable fuels
- High-oleic formulations replacing partially hydrogenated oils
- Identity-preserved and non-GM soybean oil
- Crushing and refining investment in South America and the US Midwest
- Traceable supply for European food and industrial customers
- Specialty shortenings, emulsions and functional oil blends

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