



Global Sorghum Market

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 18.9 bn
Forecast (2031)	USD 26.5 bn
CAGR (2021-2031)	5.7%
Study period	2021-2031
Largest region	Asia-Pacific · 32.4%
Fastest-growing region	Latin America · 6.7%
Market concentration	Low
Licence	Individual / Company

The global sorghum market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Food-security procurement, climate-resilient cropping, livestock-feed demand and low-carbon industrial applications are broadening the crop's commercial role beyond traditional dryland production systems. Asia-Pacific accounts for XX% of market value, while Latin America records the fastest regional growth at XX% annually. The report quantifies commercial grain, forage, sweet and biomass sorghum across applications, channels and major producing and consuming countries.

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Executive summary

The global sorghum market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Food-security procurement, climate-resilient cropping, livestock-feed demand and low-carbon industrial applications are broadening the crop's commercial role beyond traditional dryland production systems. Asia-Pacific accounts for XX% of market value, while Latin America records the fastest regional growth at XX% annually. The report quantifies commercial grain, forage, sweet and biomass sorghum across applications, channels and major producing and consuming countries.

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

Key findings

- The market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Global market value increases at a XX% CAGR between 2025 and 2031.
- USDA forecast global sorghum production at XXX tonnes for 2026/27.
- Sub-Saharan Africa produces approximately XX% of the world's sorghum in a typical year, according to USDA.
- China remains the leading import destination and has represented approximately XX% of global sorghum imports in recent years, according to USDA.
- USDA projected Chinese sorghum imports at XXX tonnes for 2026/27.
- Grain sorghum accounts for XX% of 2025 market value, supported by feed, food and brewing demand.
- Animal feed is the largest application at XX% of 2025 value, while industrial and biofuel demand grows fastest at XX% annually.

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 Sorghum Market Trends and Growth Drivers

Sorghum occupies a distinctive position between staple cereal, feed grain and climate-resilient industrial crop. Its commercial performance is driven by relative prices against maize and feed wheat, but specialized food, brewing, forage and biofuel outlets create premiums that are not fully explained by commodity energy value.

Production growth is shifting toward systems that can combine dryland resilience with modern hybrids, weed-control technology and dependable market access. Brazil, the United States and Australia supply highly commercialized channels, while African and South Asian markets offer large consumption bases and substantial upside from improved aggregation, storage and processing.

Trade remains more concentrated than production. China's procurement decisions influence exporter economics, while local food and brewing markets provide a stabilizing counterweight in Nigeria, Ethiopia, India, Mexico and Southern Africa.

Growth drivers

Climate-resilient acreage substitution

Sorghum uses water efficiently and maintains production under heat and intermittent moisture stress, making it a practical substitute for maize in dryland systems. Growers in Brazil, the United States, Mexico, Southern Europe and Australia are incorporating the crop where rainfall reliability, irrigation cost and crop margins constrain maize.

Livestock-feed demand expansion

Poultry, swine, dairy and feedlot expansion increases demand for energy grains, particularly when sorghum trades at a discount to maize. Feed mills benefit from established handling infrastructure and can adjust inclusion rates rapidly as relative prices change.

Gluten-free and whole-grain adoption

Food manufacturers are using sorghum flour, popped grain, flakes and extruded ingredients in gluten-free and whole-grain formulations. White-grain varieties with neutral colour and flavour are widening adoption in bakery, snacks, breakfast products and ready meals.

Chinese feed-grain import demand

China's feed sector values sorghum as a flexible maize substitute and as an ingredient for livestock rations and distilled beverages. Its dominant position in global imports transmits Chinese procurement decisions directly into exporter prices, planting signals and trade flows.

African brewing localization

Brewers and maltsters are increasing locally sourced cereal content to control foreign-exchange exposure and develop products aligned with regional tastes. Contract farming, improved malting varieties and

dedicated storage strengthen the commercial route from smallholder production to industrial users.

Low-carbon industrial demand

Ethanol producers and emerging bio-based material platforms are evaluating sorghum for its dryland production profile and potential carbon-intensity advantages. Climate-smart production practices, traceability and biomass yield improvements raise its value in performance-based feedstock contracts.

Restraints

Maize and feed-wheat substitution

Feed formulators switch rapidly among sorghum, maize and feed wheat according to delivered energy cost and availability. Large maize crops can compress sorghum premiums, restrict acreage growth and weaken merchant demand outside specialized channels.

Yield and infrastructure constraints

Limited access to hybrid seed, fertilizer, mechanization, drying and warehouse capacity restricts marketed surplus in several major African producing countries. Post-harvest loss and variable moisture or impurity levels also reduce the volume suitable for industrial procurement.

Import-market concentration

China's dominant share of global imports creates pronounced demand concentration for the United States, Australia and Argentina. Trade-policy shifts, phytosanitary interruptions or inventory corrections can redirect exportable supply and pressure producer prices.

Fragmented food-grade supply

Premium food, brewing and ingredient buyers require consistent colour, tannin profile, protein, moisture and contaminant performance. Fragmented aggregation and limited identity-preserved storage raise qualification costs and slow conversion from commodity-grade to higher-value channels.

Sorghum Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Climate-resilient acreage substitution	XXX	XXX	XXX
Livestock-feed demand expansion	XXX	XXX	XXX
Gluten-free and whole-grain adoption	XXX	XXX	XXX
Chinese feed-grain import demand	XXX	XXX	XXX
African brewing localization	XXX	XXX	XXX
Low-carbon industrial demand	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Maize and feed-wheat substitution	XXX	XXX	XXX
Yield and infrastructure constraints	XXX	XXX	XXX
Import-market concentration	XXX	XXX	XXX
Fragmented food-grade supply	XXX	XXX	XXX

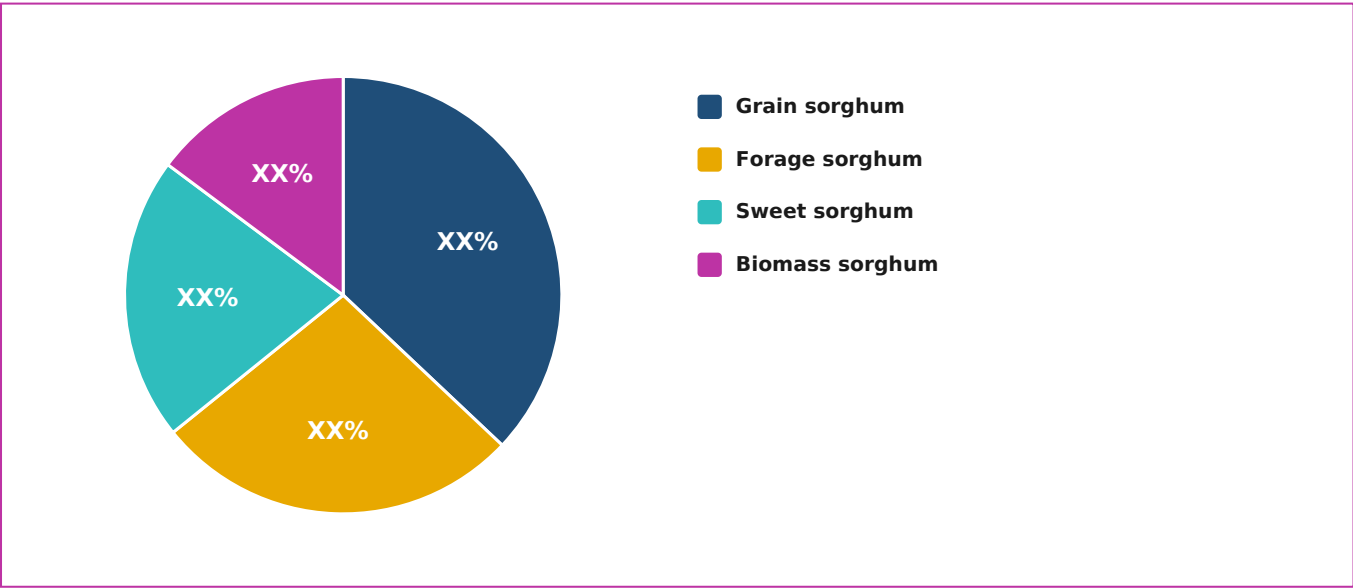
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Sorghum Market Segmentation by Product, Application and Channel

By Product Type

Grain sorghum dominates because it serves feed, staple-food, brewing and ethanol channels and benefits from standardized grain-handling systems. Forage sorghum maintains a strong position in dairy, beef and dryland livestock systems. Biomass and sweet sorghum expand fastest from a smaller base as renewable fuels, syrup, fermentation and bio-based materials attract investment.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Grain sorghum	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Forage sorghum	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sweet sorghum	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Biomass sorghum	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

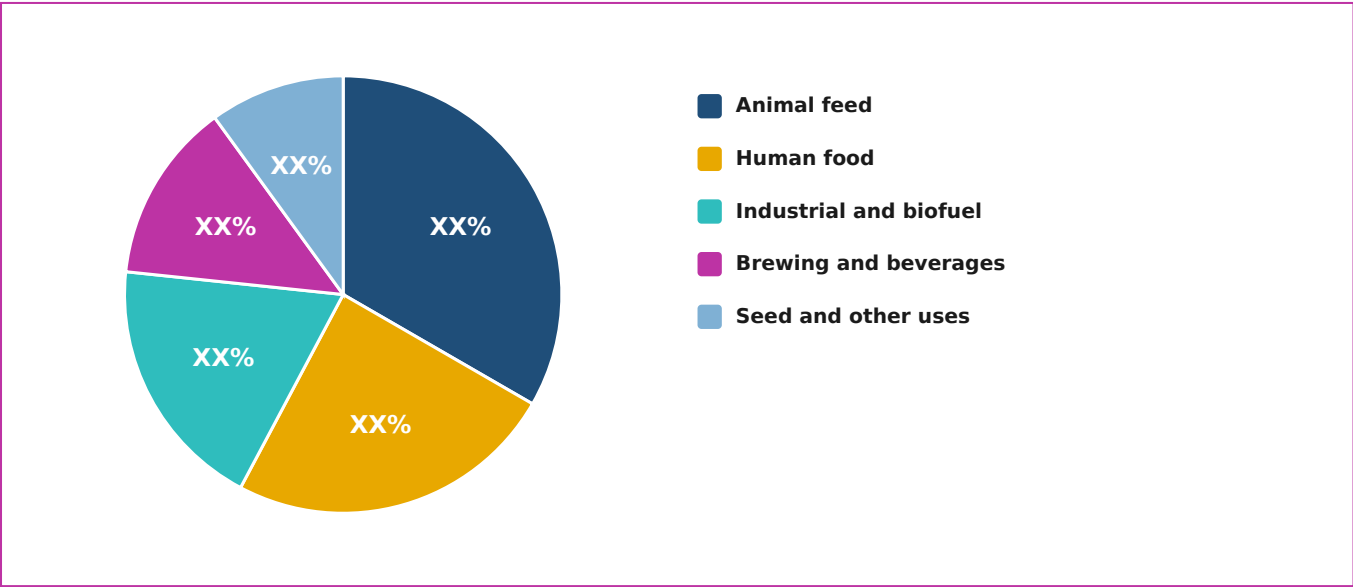
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By Application

Animal feed leads because sorghum is readily substituted for maize in poultry, swine, dairy and cattle rations. Human food remains central across Africa and South Asia and gains incremental value from gluten-free products in developed markets. Industrial and biofuel uses grow fastest as ethanol, renewable

chemicals and biomass conversion create performance-based procurement channels.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Animal feed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Human food	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial and biofuel	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Brewing and beverages	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Seed and other uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Grain Color and Commercial Grade

Red and bronze types lead through broad availability in feed and traditional-food markets. White sorghum earns stronger food and brewing premiums because of its neutral appearance, low-tannin profile and processing versatility. Specialty high-tannin and waxy types remain smaller but attract ingredient, antioxidant and differentiated feed applications.

Value by grain Color and Commercial Grade, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Red and bronze	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
White	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Tan and yellow	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialty and other grades	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Aggregators and merchants lead by consolidating fragmented farm output, managing storage and connecting production zones with processors and export terminals. Cooperatives retain importance in the United States, Europe, Australia and organized producer regions. Direct contracting expands fastest as brewers, food processors and low-carbon industrial users demand traceability and defined specifications.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Aggregators and grain merchants	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Direct contracted sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cooperatives and producer organizations	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wholesale markets and digital platforms	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

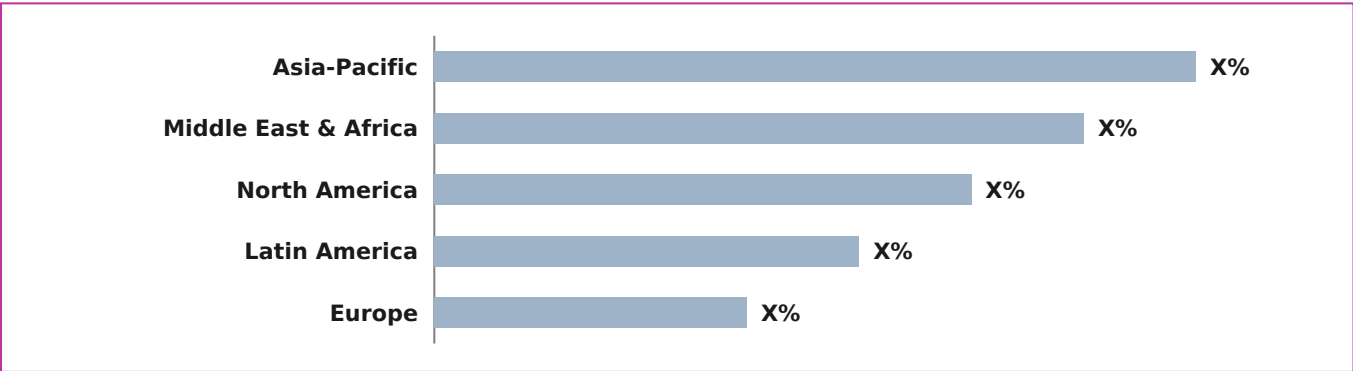
Sorghum Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global market value in 2025. China anchors internationally traded demand through feed and baijiu channels, while India combines substantial food consumption with feed, fodder and industrial uses. Australia is a major export-oriented supplier, and its crop size materially influences Pacific-basin availability and prices.

Middle East & Africa holds the largest production-volume base, with Sub-Saharan Africa accounting for approximately XX% of global output in a typical year. Nigeria, Ethiopia and Sudan combine staple-food demand with expanding commercial feed and brewing channels, although storage, input access and security conditions continue to shape marketed surplus. South Africa provides the region's most developed commercial trading, feed and seed system.

Latin America records the fastest value growth at XX% annually. Brazil's second-crop expansion benefits from established machinery, storage and port infrastructure, while Argentina adds exportable supply and Mexico remains a major producer and consumer. North American growth is slower but higher-value food ingredients, hybrid seed technology, ethanol and export merchandising sustain attractive specialized segments.

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
Middle East & Africa	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

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

Sorghum Market Competitive Landscape and Company Share

The sorghum market is structurally fragmented because production is distributed across millions of farms and a broad network of local aggregators. Global grain merchants including Cargill, ADM, Bunge, Louis Dreyfus Company, COFCO International and Olam Agri exert greater influence in export origination, storage, risk management and destination-market execution than their share of farm-level production suggests.

Competition in seed and crop technology is more concentrated. Corteva Agriscience, Advanta Seeds, Nuseed, Seed Co, KWS, Richardson Seeds and Warner Seeds compete through locally adapted hybrids, yield stability, forage quality, herbicide tolerance and agronomic service. Warner Seeds' 2025 acquisition of the Sorghum Partners brand and germplasm portfolio increased consolidation in North American sorghum genetics.

Strategic differentiation is moving toward identity-preserved supply, traceable low-carbon production, specialized food-grade grain and contracting with brewers, ethanol producers and feed integrators. Merchants with quality-controlled storage and producers using improved genetics are positioned to capture a larger portion of the value premium.

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
Bunge Global SA	XXX	XXX	XXX	XXX
Louis Dreyfus Company	XXX	XXX	XXX	XXX
COFCO International	XXX	XXX	XXX	XXX
Olam Agri	XXX	XXX	XXX	XXX
Corteva Agriscience	XXX	XXX	XXX	XXX
Advanta Seeds	XXX	XXX	XXX	XXX
Nuseed	XXX	XXX	XXX	XXX
Seed Co Limited	XXX	XXX	XXX	XXX
KWS SAAT SE & Co. KGaA	XXX	XXX	XXX	XXX
Warner Seeds, Inc.	XXX	XXX	XXX	XXX

Source: XXX

Sorghum Market Forecast, Scenarios and Opportunities to 2031

The market will add USD XXX billion between 2025 and 2031. Feed remains the largest demand pool, but industrial and biofuel applications deliver the fastest growth as carbon accounting, renewable-fuel incentives and biomass-conversion technologies improve commercial economics.

The central forecast assumes steady growth in Asian feed demand, continued Brazilian acreage expansion, gradual commercialization of African supply chains and stronger food-grade penetration in developed markets. A high-growth scenario emerges if Chinese imports remain near recent levels while low-carbon fuel programmes reward sorghum's production attributes; a weaker scenario centers on abundant maize supply and reduced Chinese procurement.

Winning strategies will combine locally adapted seed genetics with verified quality, storage discipline and committed offtake. Suppliers able to segregate food-grade, brewing-grade and low-carbon feedstock streams will outperform undifferentiated commodity channels.

Opportunities

- High-tannin and specialty antioxidant food ingredients
- Identity-preserved white sorghum for food and brewing
- Low-carbon-intensity ethanol feedstock contracts
- Hybrid seed and herbicide-tolerant production systems
- Brazilian second-crop expansion
- Commercial aggregation and storage in Sub-Saharan Africa
- Sweet-sorghum syrup, fermentation and renewable-chemical platforms

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