



Global Broken Rice 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 22.6 bn
Forecast (2031)	USD 31.5 bn
CAGR (2021-2031)	5.7%
Study period	2021-2031
Largest region	Asia-Pacific · 48%
Fastest-growing region	Middle East and Africa · 6.8%
Market concentration	Low
Licence	Individual / Company

The global broken rice market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a CAGR of XX%. Demand is strengthening across food processing, compound feed, brewing, distilling and industrial starch applications as buyers pursue cost-efficient carbohydrate inputs. Asia-Pacific accounts for XX% of market value, while the Middle East and Africa is the fastest-growing region at XX% CAGR. India's return to unrestricted broken-rice exports, rising African import requirements and investment in precision milling are reshaping global supply, pricing and trade flows.

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Executive summary

The global broken rice market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a CAGR of XX%. Demand is strengthening across food processing, compound feed, brewing, distilling and industrial starch applications as buyers pursue cost-efficient carbohydrate inputs. Asia-Pacific accounts for XX% of market value, while the Middle East and Africa is the fastest-growing region at XX% CAGR. India's return to unrestricted broken-rice exports, rising African import requirements and investment in precision milling are reshaping global supply, pricing and trade flows.

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.
- Commercial demand is forecast to rise from XXX tonnes in 2025 to XXX tonnes in 2031.
- Asia-Pacific held XX% of global market value in 2025, supported by dense milling capacity and established food-processing demand.
- Food manufacturing and direct food use represented XX% of market value in 2025.
- High-breakage grades containing more than XX% broken kernels accounted for XX% of value and led feed, brewing and starch applications.
- The Middle East and Africa will record the fastest regional expansion at XX% CAGR through 2031.
- FAO forecast global rice production at a record XXX tonnes on a milled basis for 2025/26.
- FAO forecast international rice trade at XXX tonnes in 2025, reinforcing availability across import-dependent markets.

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 Broken Rice Market Trends and Growth Drivers

Broken rice is moving from a residual milling stream toward a deliberately graded ingredient market. Buyers increasingly contract around breakage ratio, variety, starch functionality, moisture, foreign matter and residue performance, allowing modern mills to capture more value from each tonne of paddy.

Trade policy remains the market's most immediate balancing mechanism. India's 2025 reopening expanded global liquidity, while African import demand and Asian feed requirements intensified competition for economical grades. Multi-origin procurement and inventory flexibility therefore remain central to buyer strategy.

The next phase of growth will be determined by processing quality as much as crop volume. Optical sorting, automated grading, traceability and laboratory controls are widening the addressable market for food-grade fractions, while energy, freight and substitute-grain economics continue to govern bulk industrial demand.

Growth drivers

Processed-food demand broadens the food-grade market

Broken rice provides a neutral-tasting, gluten-free carbohydrate base for noodles, flour, snacks, cereals and extruded foods. Manufacturers are shifting procurement toward tightly specified fractions because cleaned and uniformly graded material lowers formulation cost while maintaining texture and yield.

Feed and aquaculture output lifts bulk consumption

High-breakage rice competes effectively with maize and wheat in energy-focused feed formulations when relative prices are favorable. Poultry, swine and aquaculture producers in Asia and Africa provide a large-volume outlet for grades that do not meet table-rice specifications.

India's export reopening restores global liquidity

India's March 2025 decision to make exports under ITC HS 10064000 free restored a major source of price-competitive supply. Greater availability improves procurement flexibility for African food importers, Asian feed mills and ethanol or starch processors.

Brewing and fermentation create stable industrial demand

Brewers and distillers use broken rice as an adjunct or fermentation substrate because its starch content is comparable with whole rice at a lower acquisition cost. Capacity additions in beer, spirits, rice syrup and fermentation ingredients support contracted, specification-led demand.

Precision sorting raises recoverable value

Modern optical sorting, length grading and contaminant-removal systems allow mills to separate food-grade fractions from feed-grade streams more consistently. The resulting quality ladder increases realizations per tonne and expands access to packaged food and ingredient customers.

African urbanization accelerates import demand

Population growth, urban meal formats and consumer preference for affordable rice-based foods are increasing requirements across West and Central Africa. Importers increasingly source broken rice for direct consumption as well as local repacking, flour milling and feed production.

Restraints

Export controls disrupt contract availability

Rice-producing governments periodically alter duties, quotas and export permissions to protect domestic food supply. These interventions can redirect cargoes quickly, raise replacement costs and reduce forward-contract confidence for importers.

Climate volatility constrains milling throughput

Drought, flooding, salinity intrusion and irregular monsoons affect harvested area, milling quality and the proportion of kernels that break. Although higher breakage can increase physical supply, weak crops reduce total throughput and create unstable grade distributions.

Quality inconsistency limits premium applications

Mixed varieties, variable moisture, foreign matter and residue concerns restrict access to infant food, premium flour and export food channels. Suppliers without modern cleaning, laboratory testing and traceability remain concentrated in lower-margin feed markets.

Substitute grains cap industrial pricing

Feed mills, brewers and starch processors can switch among broken rice, maize, wheat, cassava and other carbohydrate sources. Sustained price premiums over substitute feedstocks reduce inclusion rates and redirect demand toward locally abundant alternatives.

Broken Rice Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Processed-food demand broadens the food-grade market	XXX	XXX	XXX
Feed and aquaculture output lifts bulk consumption	XXX	XXX	XXX
India's export reopening restores global liquidity	XXX	XXX	XXX
Brewing and fermentation create stable industrial demand	XXX	XXX	XXX
Precision sorting raises recoverable value	XXX	XXX	XXX
African urbanization accelerates import demand	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Export controls disrupt contract availability	XXX	XXX	XXX
Climate volatility constrains milling throughput	XXX	XXX	XXX
Quality inconsistency limits premium applications	XXX	XXX	XXX
Substitute grains cap industrial pricing	XXX	XXX	XXX

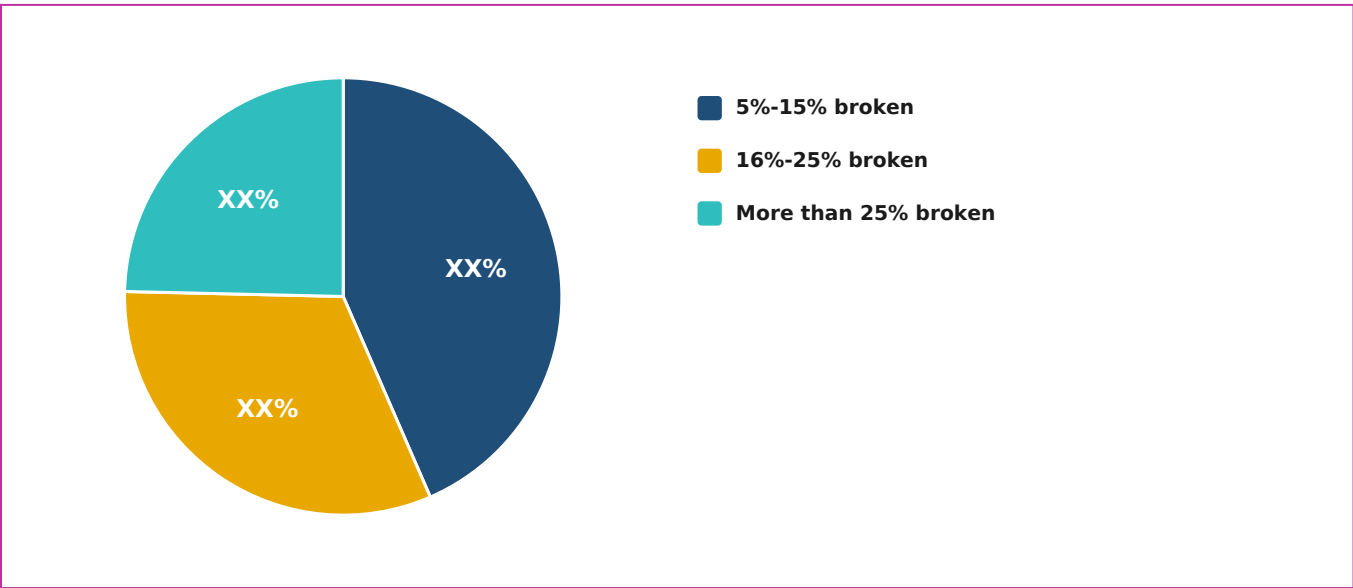
Source: XXX

Broken Rice Market Segmentation by Grade, Processing, End Use and Channel

By Broken-Kernel Grade

High-breakage grades dominate bulk feed, brewing, starch and price-sensitive food channels because buyers prioritize starch yield and acquisition cost over grain appearance. The XX%-XX% grade commands higher prices in flour, noodles and direct food applications, while the XX%-XX% category balances appearance and cost. Food-grade XX%-XX% material will post the fastest value growth as sorting and traceability improve.

Value share by broken-Kernel Grade, 2025



Source: XXX

Value by broken-Kernel Grade, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
5%-15% broken	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
16%-25% broken	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
More than 25% broken	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Processing Type

Raw broken rice leads because it is widely generated across conventional milling systems and suits food, feed and starch conversion. Parboiled material benefits from improved kernel integrity, nutrient retention and strong consumer acceptance in Africa. Specialty and glutinous fractions grow from smaller bases as

snack, dessert and ingredient manufacturers request variety-specific functionality.

Value by processing Type, USD bn

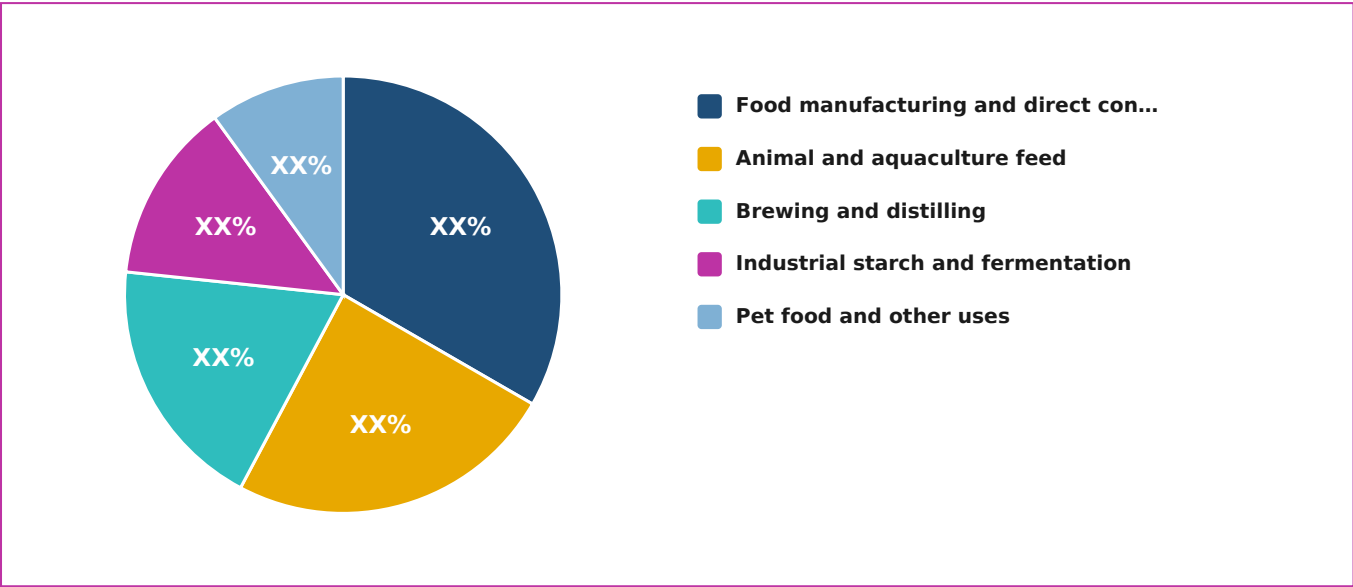
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Raw broken rice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Parboiled broken rice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Glutinous broken rice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialty and other processed grades	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End Use

Food applications lead through flour, noodles, porridge, snacks, cereals and affordable table-rice blends. Feed represents the largest bulk-volume outlet and responds rapidly to price relationships with maize and wheat. Brewing, distilling, starch and fermentation applications are becoming more specification-driven, increasing demand for consistent starch content, moisture and particle size.

Value share by end Use, 2025



Source: XXX

Value by end Use, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Food manufacturing and direct consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Animal and aquaculture feed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Brewing and distilling	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial starch and fermentation	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pet food and other uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Direct sales lead where feed mills, brewers, starch processors and large food manufacturers require contracted volume and repeatable specifications. Distributors remain essential for fragmented foodservice and small-processor demand, particularly in African import markets. Commodity traders and brokers grow through cross-border arbitrage, freight management and multi-origin sourcing.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Distributors and wholesalers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Commodity traders and brokers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

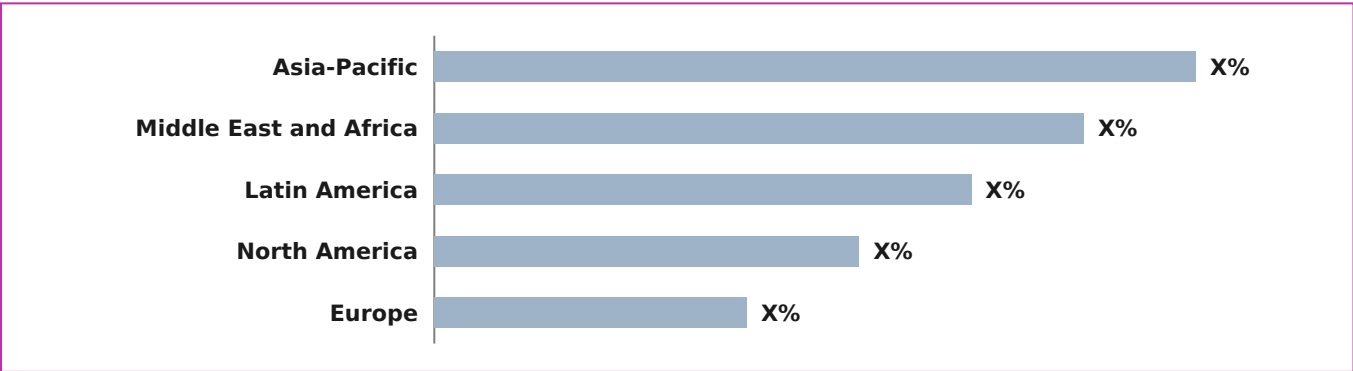
Broken Rice Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global market value in 2025. India, China, Vietnam, Thailand, Indonesia and Pakistan combine large paddy harvests with dense milling networks, while food processing, feed production and brewing provide multiple outlets for each recovered grade. India is the pivotal swing supplier following the restoration of unrestricted broken-rice exports, while Vietnam and Thailand retain strong positions in quality-controlled export channels.

The Middle East and Africa is forecast to expand at XX% CAGR, the fastest regional pace through 2031. West African importers use broken rice for affordable household consumption, repacking and foodservice, while local feed and flour industries broaden the addressable market. Nigeria offers the largest underlying consumption opportunity, and Côte d'Ivoire, Senegal and Ghana provide attractive import-distribution platforms.

Latin America combines exportable surpluses in Brazil, Uruguay, Paraguay and Argentina with regional demand from feed, brewing and starch users. North America and Europe grow more slowly but generate higher unit values through pet food, brewing, gluten-free ingredients and identity-preserved applications; compliance, traceability and consistent particle-size specifications are decisive in these markets.

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 and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	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

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

Broken Rice Market Competitive Landscape and Company Share

The global broken rice market remains fragmented, with the ten largest suppliers representing XX% of 2025 revenue. Large agricultural merchants compete through multi-origin procurement, freight execution and risk management, while regional millers retain an advantage in paddy access, grade flexibility and local customer relationships. No company controls enough supply to determine global pricing independently.

Olam Agri, Wilmar International, Louis Dreyfus Company, Vinafood II, CP Intertrade, Asia Golden Rice, LT Foods, KRBL and SunRice are prominent participants across trading, milling or value-added rice channels. Competitive differentiation is moving beyond bulk tonnage toward optical sorting, laboratory assurance, traceable sourcing, customer-specific granulation and the ability to deliver both food-grade and industrial-grade specifications.

Strategic activity is centered on ownership realignment, integrated processing and downstream value addition. SALIC's proposed acquisition of Olam Group's remaining Olam Agri interest changes the ownership profile of a major global merchant, while Wilmar continues to deepen integrated food processing. Millers are prioritizing energy efficiency, automated grading, by-product monetization and direct industrial contracts rather than relying solely on spot exports.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Olam Agri	XXX	XXX	XXX	XXX
Wilmar International Limited	XXX	XXX	XXX	XXX
Louis Dreyfus Company	XXX	XXX	XXX	XXX
Vinafood II	XXX	XXX	XXX	XXX
CP Intertrade Co., Ltd.	XXX	XXX	XXX	XXX
Asia Golden Rice Co., Ltd.	XXX	XXX	XXX	XXX
LT Foods Limited	XXX	XXX	XXX	XXX
KRBL Limited	XXX	XXX	XXX	XXX
SunRice Group	XXX	XXX	XXX	XXX
Riceland Foods, Inc.	XXX	XXX	XXX	XXX
Ebro Foods, S.A.	XXX	XXX	XXX	XXX
Trung An High-Tech Agriculture Joint Stock Company	XXX	XXX	XXX	XXX

Source: XXX

Broken Rice Market Forecast and Commercial Opportunities

The market will add USD XXX billion between 2025 and 2031 as rising rice output, deeper by-product recovery and diversified industrial use expand commercial turnover. Volume growth will remain strongest in feed-grade material, while value growth will be led by cleaned food-grade fractions, specialty flour inputs and traceable ingredient contracts.

The central forecast assumes broadly open trade among major Asian exporters, continued African import growth and stable substitution economics against maize and wheat. A high-growth scenario emerges if Indian exports remain consistently available and African processing investment accelerates; renewed export restrictions or consecutive climate-related crop losses would tighten supply and delay volume expansion.

Winning suppliers will combine multi-origin sourcing with precise grading, food-safety controls and flexible pack formats. Buyers will place greater value on residue testing, moisture control, digital traceability and reliable shipment execution, creating a clear margin divide between undifferentiated bulk sellers and application-focused ingredient suppliers.

Opportunities

- Food-grade fractions for noodles, snacks, infant foods and gluten-free formulations
- Application-specific feed blends for poultry, swine and aquaculture
- Rice-derived starch, sweetener and fermentation capacity
- Traceable low-emission broken rice from modernized Asian supply chains
- Regional cleaning, grading and bagging hubs in African import markets
- Digital procurement and quality-assurance platforms linking mills with industrial buyers

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.