



Global Oat Bran 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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Indicator	Value
Market size (2025)	USD 2.6 bn
Forecast (2031)	USD 4.3 bn
CAGR (2021-2031)	9.1%
Study period	2021-2031
Largest region	North America · 35.5%
Fastest-growing region	Asia-Pacific · 10.8%
Market concentration	Moderate
Licence	Individual / Company

The global oat bran market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a CAGR of XX%. Demand is moving beyond hot cereals into high-fibre bakery, nutrition bars, supplements, meal replacements and beta-glucan-enriched foods. North America leads with XX% of market value, while Asia-Pacific is the fastest-growing region at a XX% CAGR. Supply security, beta-glucan standardisation, certified gluten-free processing and health-claim compliance increasingly determine supplier competitiveness.

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Executive summary

The global oat bran market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a CAGR of XX%. Demand is moving beyond hot cereals into high-fibre bakery, nutrition bars, supplements, meal replacements and beta-glucan-enriched foods. North America leads with XX% of market value, while Asia-Pacific is the fastest-growing region at a XX% CAGR. Supply security, beta-glucan standardisation, certified gluten-free processing and health-claim compliance increasingly determine supplier competitiveness.

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

Key findings

- Global oat bran sales reached USD XXX billion in 2025 and will rise to USD XXX billion by 2031.
- North America generated XX% of 2025 revenue, supported by established heart-health claims, large oat-milling capacity and broad retail availability.
- Asia-Pacific will record the fastest regional CAGR at XX% through 2031 as fibre fortification expands across bakery, breakfast and convenient nutrition products.
- Breakfast cereals represented XX% of oat bran value in 2025, while functional foods and supplements will grow fastest at XX% annually.
- Conventional food-grade oat bran accounted for XX% of 2025 sales, but certified gluten-free grades will advance at a XX% CAGR.
- EU farms harvested XXX tonnes of oats in 2023, equal to XX% of EU cereal production, according to Eurostat.
- Poland, Finland and Spain supplied XX% of EU oat production in 2023, concentrating European milling exposure in a limited group of crop regions.
- USDA estimated United States oat production at XXX bushels in 2025, up XX% year over year, from XXX seeded acres.

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 Oat Bran Market Trends and Growth Drivers

Oat bran sits at the intersection of commodity grain economics and premium functional nutrition. Its value is determined not only by raw-oat prices but also by milling yield, lipid stability, particle size, beta-glucan concentration, gluten-control protocols and the regulatory claims available to the finished-food customer.

Demand is broadening from standalone breakfast bran into bakery, snacks, nutrition powders and claim-ready formulations. This transition raises the importance of consistent viscosity and sensory performance because industrial customers require predictable behaviour across mixing, extrusion, baking and shelf life.

The supply side remains exposed to concentrated growing regions and competition for food-grade oats from flakes, beverages and other value-added products. Processors with contracted acreage, varietal expertise, segregated storage and multiple milling locations are positioned to protect service levels and margins.

Growth drivers

Recognised beta-glucan heart-health claims

Regulatory recognition gives oat bran a substantiated benefit that commodity cereal fibres cannot always match. Claim-ready products allow cereal, bakery and nutrition brands to compete on cholesterol-management and soluble-fibre positioning while supporting higher ingredient margins.

Fibre fortification in mainstream foods

Manufacturers are increasing fibre in bread, biscuits, nutrition bars and meal replacements without shifting entirely to unfamiliar ingredients. Oat bran provides soluble and insoluble fibre, mild cereal flavour and a consumer-recognisable label, enabling broader use than highly technical fibre isolates.

Certified gluten-free portfolio expansion

Dedicated gluten-free oat chains are turning oat bran into a premium ingredient for consumers who avoid wheat, rye and barley. The opportunity favours suppliers capable of controlling seed purity, crop rotation, transport, milling and finished-product testing.

Functional nutrition and healthy ageing

Nutrition companies are incorporating oat bran into satiety, digestive-health and cardiometabolic formulations aimed at older and health-active consumers. Fine particle sizes and specified beta-glucan levels are extending use into powders, shakes and supplement-adjacent foods.

Clean-label cereal reformulation

Oat bran can raise fibre content while retaining a short, recognisable ingredient declaration. This supports reformulation of products that previously relied on modified starches or less consumer-friendly fibre systems, particularly in premium bakery and snack ranges.

Asian convenient-food innovation

Product developers are adapting oats to noodles, rice substitutes, savoury cups and multigrain bakery products. These formats broaden oat bran demand beyond porridge and imported breakfast cereals and create a larger addressable industrial market.

Restraints

Milling-oat crop volatility

Oat yields, test weights and beta-glucan characteristics vary with weather and growing region, affecting both availability and extraction economics. Price spikes compress margins for processors that cannot pass through costs or draw on multi-origin supply.

Gluten cross-contact controls

Oats frequently share fields, elevators and mills with gluten-containing cereals. Dedicated systems and repeated analytical testing raise delivered costs and constrain the number of suppliers able to serve regulated or medically sensitive gluten-free channels.

Substitute fibre competition

Wheat bran competes on price, while psyllium, inulin and isolated fibres can deliver higher fibre concentrations at lower inclusion rates. Oat bran must therefore win on formulation performance, taste, whole-food recognition and beta-glucan functionality rather than fibre content alone.

Sensory and processing constraints

High oat-bran inclusion can darken products, increase water absorption and produce coarse or dense textures. Manufacturers often require fine milling, stabilisation and formulation support, adding development time and limiting adoption in delicate applications.

Oat Bran Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Recognised beta-glucan heart-health claims	XXX	XXX	XXX
Fibre fortification in mainstream foods	XXX	XXX	XXX
Certified gluten-free portfolio expansion	XXX	XXX	XXX
Functional nutrition and healthy ageing	XXX	XXX	XXX
Clean-label cereal reformulation	XXX	XXX	XXX
Asian convenient-food innovation	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Milling-oat crop volatility	XXX	XXX	XXX
Gluten cross-contact controls	XXX	XXX	XXX
Substitute fibre competition	XXX	XXX	XXX
Sensory and processing constraints	XXX	XXX	XXX

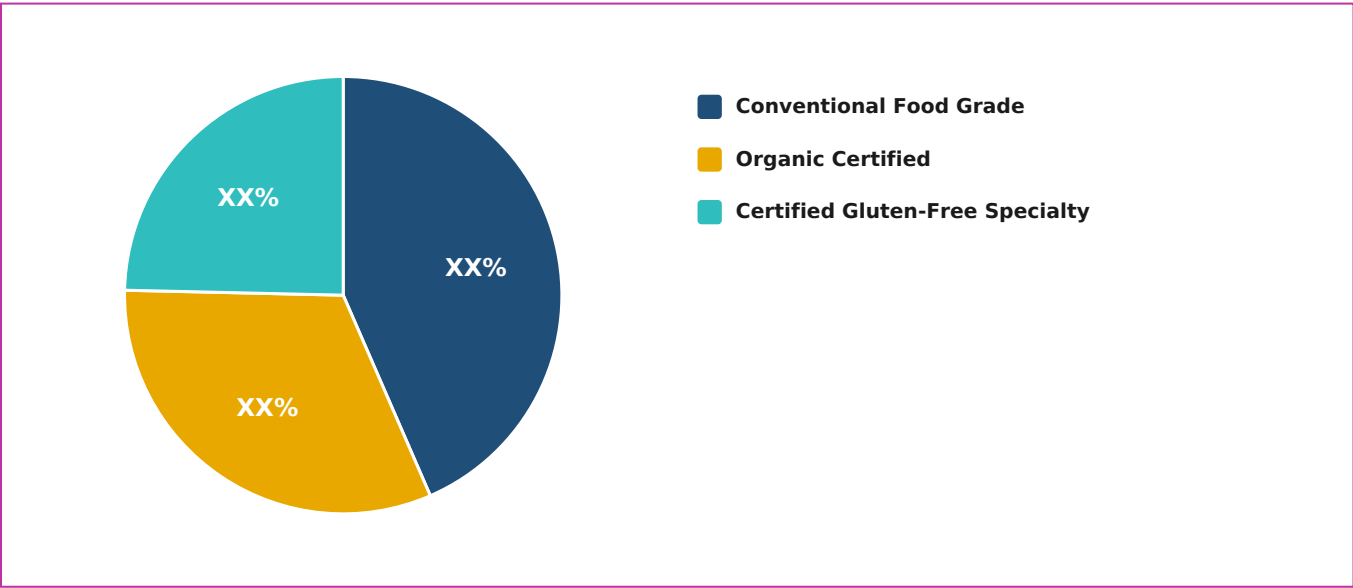
Source: XXX

Oat Bran Market Segmentation Analysis by Grade, Form, Application and Channel

By Product Grade

Conventional food-grade material remains the volume anchor because it serves mainstream cereal, bakery and industrial-food contracts. Organic grade benefits from premium retail and clean-label positioning, while certified gluten-free bran commands the strongest premium because dedicated supply and testing requirements restrict qualified capacity.

Value share by product Grade, 2025



Source: XXX

Value by product Grade, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional Food Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic Certified	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Certified Gluten-Free Specialty	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Form

Coarse bran dominates hot cereals, artisan bakery and basic industrial formulations because it offers familiar texture and favourable economics. Fine-milled and stabilised products are gaining where manufacturers need smoother mouthfeel, longer shelf life and predictable hydration. Concentrated bran fractions grow fastest as brands formulate around soluble-fibre and beta-glucan targets.

Value by form, USD bn

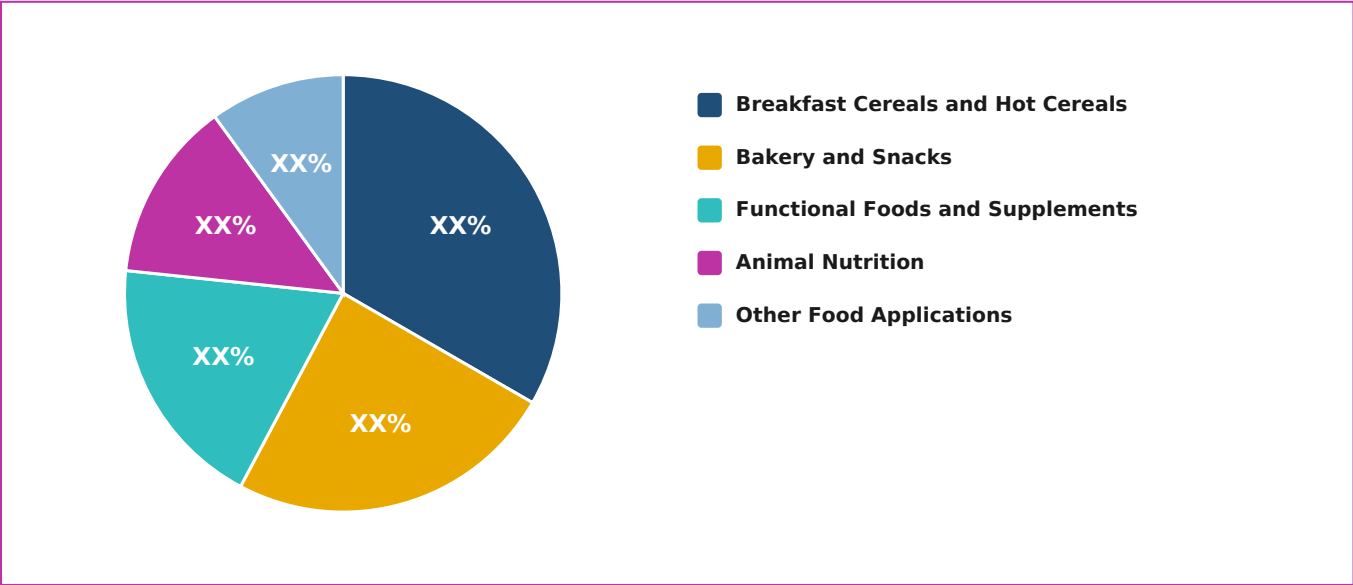
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Coarse Oat Bran	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fine-Milled Oat Bran	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Stabilised or Toasted Oat Bran	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Beta-Glucan-Rich Bran Concentrates	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Breakfast applications remain the largest established outlet, but bakery and snacks are producing the greatest incremental volume as manufacturers raise fibre claims across mainstream products. Functional nutrition grows fastest because specified beta-glucan content supports higher-value positioning in shakes, bars, meal replacements and healthy-ageing products.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Breakfast Cereals and Hot Cereals	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bakery and Snacks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Functional Foods and Supplements	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Animal Nutrition	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Food Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Industrial contracts dominate because most bran is incorporated into manufactured foods rather than sold as a standalone consumer product. Offline retail retains a strong base in natural-food and baking aisles, while e-commerce grows fastest by expanding access to organic, gluten-free and specialist pack sizes.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct B2B Ingredient Sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Offline Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
E-Commerce Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging

Multiwall sacks are the standard format for bakery, cereal and foodservice customers, while flexible intermediate bulk containers support high-throughput processors. Consumer pouches and cartons gain from resealability, smaller households and online fulfilment. Drums and lined specialty containers serve high-specification concentrates and sensitive formulations.

Value by packaging, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Industrial Multiwall Sacks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Flexible Intermediate Bulk Containers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Consumer Pouches and Cartons	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Drums and Specialty Containers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

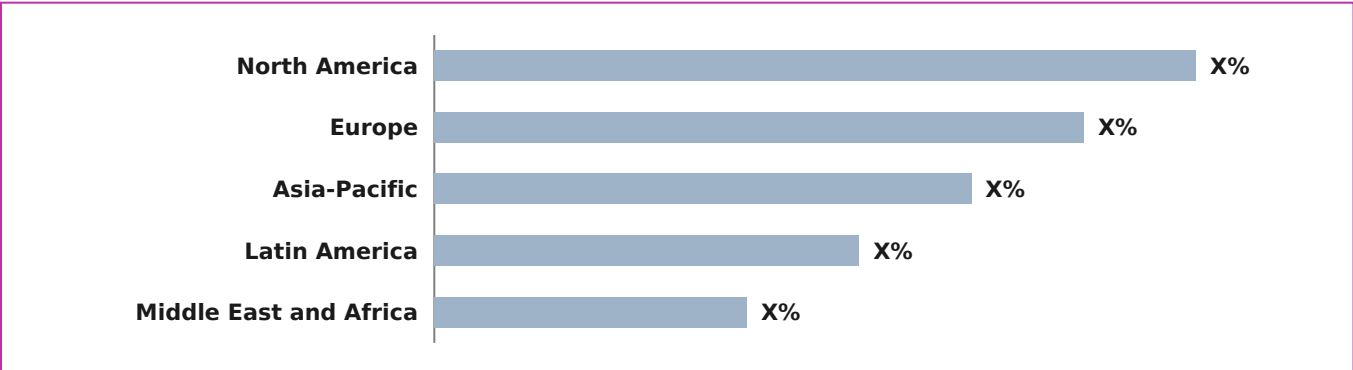
Oat Bran Market Regional Analysis and Country Outlook

North America held XX% of global value in 2025. The United States combines familiar oat-bran positioning, established FDA health-claim rules and broad use in cereals, baking and functional nutrition, while Canada supplies a large share of the region's milling-oat base. Integrated procurement and milling networks give Richardson Milling, Grain Millers and other regional processors an advantage in consistent specifications and certified programmes.

Europe accounted for XX% of sales, with demand concentrated in the United Kingdom, Germany and the Nordic countries. Nordic suppliers benefit from specialised oat cultivation and established expertise in beta-glucan-rich ingredients, while the region's authorised nutrition and health-claim framework encourages precise formulation around beta-glucan dosage. Crop concentration in Poland, Finland and Spain also makes harvest quality and cross-border logistics important pricing variables.

Asia-Pacific represented XX% of 2025 value and will grow at XX% annually through 2031. China, Japan, India and Australia are moving oat bran into convenient breakfast, bakery, supplement and savoury applications, while local partnerships are developing oat-based noodles and rice alternatives. Latin America and the Middle East and Africa remain smaller but gain from modern retail, imported health foods and industrial bakery expansion.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	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

Oat Bran Market Competitive Landscape and Company Share

The market is moderately concentrated at the milling level and fragmented in packaged retail. Richardson Milling, Grain Millers, Lantmännen, Helsinki Mills and other scaled processors compete through grower networks, milling yield, beta-glucan specifications, food-safety systems and the ability to supply conventional, organic and certified gluten-free grades.

Competition is shifting from undifferentiated bran toward application-ready ingredients. Fine milling, heat stabilisation, microbial control, verified gluten thresholds, traceability and technical formulation support support stronger margins than standard bulk bran. Retail brands such as Bob's Red Mill, NOW Foods and Mornflake compete through consumer trust, organic certification, pack convenience and omnichannel availability.

Capacity programmes and downstream oat innovation are strengthening demand for specialised fractions. Richardson's Bedford expansion, Lantmännen's integration of its oat biorefinery and new commercial partnerships for oat-based staples illustrate the industry's movement toward higher-value processing. Strategic priorities through 2031 will centre on contracted supply, claim-ready beta-glucan content and customer-specific particle-size and functionality profiles.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Richardson Milling	XXX	XXX	XXX	XXX
Grain Millers, Inc.	XXX	XXX	XXX	XXX
Lantmännen	XXX	XXX	XXX	XXX
Swedish Oat Fiber AB	XXX	XXX	XXX	XXX
Helsinki Mills Ltd.	XXX	XXX	XXX	XXX
Fazer Mills	XXX	XXX	XXX	XXX
Mornflake	XXX	XXX	XXX	XXX
Bay State Milling Company	XXX	XXX	XXX	XXX
Bob's Red Mill Natural Foods	XXX	XXX	XXX	XXX
NOW Foods	XXX	XXX	XXX	XXX

Source: XXX

Oat Bran Market Forecast, Scenarios and Opportunities to 2031

The global market will add USD XXX billion between 2025 and 2031. Base-case growth is anchored in mainstream fibre fortification, with the largest absolute gains coming from bakery, cereals and snacks and the fastest percentage gains coming from functional foods, supplements and certified gluten-free grades.

In the upside scenario, stronger cardiometabolic-health positioning, wider Asian food-format adoption and improved high-beta-glucan cultivars lift the 2031 market above USD XXX billion. The downside scenario, shaped by repeated crop shortfalls, weak consumer spending and substitution by lower-cost fibres, limits the market to approximately USD XXX billion.

Winning suppliers will manage the full specification chain from seed and farm protocol to finished bran. They will combine multi-year grower relationships with dedicated gluten-free capability, validated beta-glucan performance, flexible milling and application support for high-inclusion formulations.

Opportunities

- Standardised high-beta-glucan bran for claim-ready formulations
- Fine-milled bran for beverages, nutrition powders and smooth-texture foods
- Organic and regenerative oat-bran supply programmes
- Savoury noodles, flatbreads and convenient meals in Asian markets
- Private-label retail bran and subscription-based e-commerce
- Upcycled bran fractions with verified nutritional and sustainability specifications

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