

Global Rice Flour 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

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Indicator	Value
Market size (2025)	USD 1.2 bn
Forecast (2031)	USD 1.7 bn
CAGR (2021-2031)	6.2%
Study period	2021-2031
Largest region	Asia-Pacific · 46.8%
Fastest-growing region	Asia-Pacific · 6.8%
Market concentration	Low
Licence	Individual / Company

The global rice flour market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounts for XX% of market value, supported by established rice-based food cultures, large milling capacity and expanding industrial bakery, noodle and snack production. Bakery and confectionery is the leading application at XX%, while infant nutrition and gluten-free formulated foods generate the strongest specification and traceability premiums. Growth through 2031 will be shaped by clean-label formulation, finer milling technology, certified gluten controls, organic sourcing and stricter contaminant-management requirements.

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Executive summary

The global rice flour market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounts for XX% of market value, supported by established rice-based food cultures, large milling capacity and expanding industrial bakery, noodle and snack production. Bakery and confectionery is the leading application at XX%, while infant nutrition and gluten-free formulated foods generate the strongest specification and traceability premiums. Growth through 2031 will be shaped by clean-label formulation, finer milling technology, certified gluten controls, organic sourcing and stricter contaminant-management requirements.

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

Key findings

- The global rice flour market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Market volume reached XXX metric tonnes in 2025 and is forecast to rise to XXX metric tonnes by 2031.
- Asia-Pacific held XX% of global market value in 2025 and will record the fastest regional CAGR of XX% through 2031.
- Bakery and confectionery represented XX% of 2025 demand, reflecting rice flour's role in gluten-free bread, cakes, biscuits, batters and texture systems.
- Conventional rice flour accounted for XX% of market value, while organic flour will expand at an XX% CAGR.
- USDA placed 2025/26 global milled-rice production at XXX metric tonnes, with India and China contributing XX% and XX%, respectively.
- FAO forecast international rice trade at a record XXX tonnes in 2025, increasing raw-material availability across importing markets.
- Japan's Ministry of Agriculture, Forestry and Fisheries reported rice-for-flour demand of XXX tonnes in fiscal 2023, up XX% year over year.

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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 Rice Flour Market Trends and Growth Drivers

Rice flour is moving from a largely traditional and commodity-oriented milling category toward a functionally differentiated food ingredient market. Particle size, amylose content, gelatinization behavior, color, flavor neutrality and water absorption increasingly determine suitability for individual bakery, noodle, coating and infant-food processes.

Demand growth is supported by two distinct engines. Asia-Pacific is scaling industrial production of established rice-based foods, while North America and Europe are raising the value of each tonne through gluten-free, organic, clean-label and sensitive-nutrition applications. These forces reward suppliers that can serve both high-volume regional processors and tightly specified multinational accounts.

Raw-material abundance alone does not guarantee market access. Premium customers increasingly require verified segregation, contaminant testing, gluten cross-contact controls, stable crop-origin programs and technical support, creating a widening performance gap between commodity mills and specialized ingredient suppliers.

Growth drivers

Gluten-Free Formulation Moves into the Mainstream

Rice flour provides a neutral-tasting, naturally gluten-free base for bread, cakes, biscuits, pasta and prepared foods. Broader retail distribution and improved hydrocolloid, enzyme and protein systems are enabling manufacturers to move beyond niche free-from products into mainstream texture and indulgence propositions.

Asian Convenience Foods Expand Industrial Demand

Urbanization and modern retail are increasing consumption of rice noodles, frozen foods, coated products and extruded snacks. Large processors require standardized particle size, moisture, amylose content and microbiological performance, shifting volume from informal mills toward qualified industrial suppliers.

Clean-Label Texture Systems Gain Adoption

Rice flour can supply crispness, adhesion, viscosity and opacity while supporting short ingredient declarations. The strongest opportunity lies in formulations where specialty flour replaces part of a modified-starch system without compromising process tolerance.

Fine Milling Improves Bakery Performance

Advances in jet milling, pin milling, wet milling and particle classification are reducing grittiness and improving water absorption and crumb uniformity. Mills that combine precise granulation with application laboratories can address higher-value bread, pizza, confectionery and batter accounts.

Infant Nutrition Raises Specification Value

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Rice flour remains an important cereal base for infant foods because of its mild flavor, digestibility and formulation versatility. Farm traceability, contaminant screening and dedicated processing increase qualification costs but also sustain attractive premiums for approved suppliers.

Public Policy Supports Rice Diversification

Japan and South Korea are promoting flour-specific rice varieties, bakery trials and processing capacity to diversify grain demand. These programs improve agronomic learning, stimulate product development and reduce the commercial risk of adopting domestic rice flour.

Restraints

Rice Price and Trade Volatility

Export restrictions, weather shocks and government procurement can rapidly alter the cost and availability of suitable milling rice. Flour manufacturers with limited origin diversification face margin compression when customer contracts lag raw-material inflation.

Arsenic and Residue Controls Raise Costs

Rice-based ingredients require disciplined variety selection, field controls and lot-level testing for inorganic arsenic and pesticide residues. Compliance is most demanding in infant nutrition and export channels, where rejected lots can disrupt production and customer qualification.

Limited Native Dough Elasticity

Rice flour lacks gluten's viscoelastic network and generally requires starches, proteins, fibers or hydrocolloids in leavened bakery systems. Added formulation complexity and higher ingredient costs can constrain substitution in value-sensitive bread and foodservice products.

Cross-Contact Restricts Certified Supply

Mills processing wheat, barley or rye require validated segregation, sanitation and testing before serving certified gluten-free accounts. Capital requirements and audit burdens limit the number of suppliers able to guarantee stringent cross-contact thresholds.

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Rice Flour Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Gluten-Free Formulation Moves into the Mainstream	XXX	XXX	XXX
Asian Convenience Foods Expand Industrial Demand	XXX	XXX	XXX
Clean-Label Texture Systems Gain Adoption	XXX	XXX	XXX
Fine Milling Improves Bakery Performance	XXX	XXX	XXX
Infant Nutrition Raises Specification Value	XXX	XXX	XXX
Public Policy Supports Rice Diversification	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Rice Price and Trade Volatility	XXX	XXX	XXX
Arsenic and Residue Controls Raise Costs	XXX	XXX	XXX
Limited Native Dough Elasticity	XXX	XXX	XXX
Cross-Contact Restricts Certified Supply	XXX	XXX	XXX

Source: XXX

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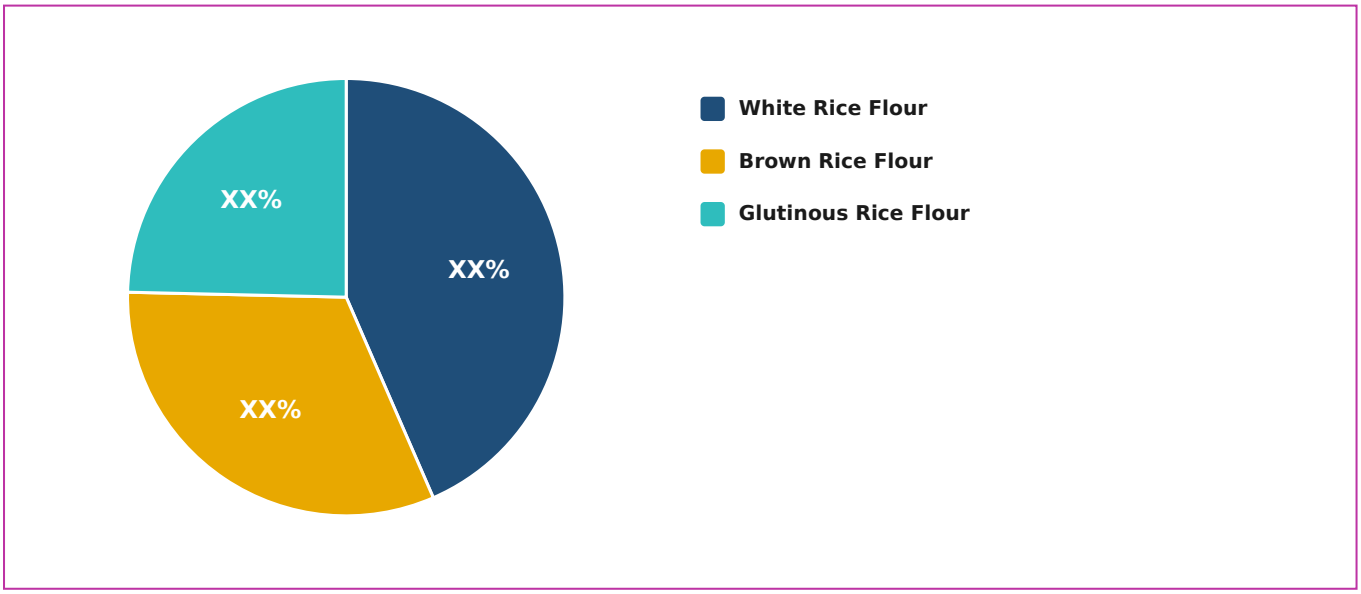
Rice Flour Market Segmentation Analysis by Type, Nature, Application and Channel

By Product Type

White rice flour dominates because its neutral color, mild flavor and predictable starch behavior suit bakery, noodles, batters and infant foods. Glutinous rice flour retains a strong position in Asian confectionery and frozen foods. Brown rice flour is expanding fastest as whole-grain positioning, fiber retention and natural-food demand offset its shorter shelf life and stronger flavor.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
White Rice Flour	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Brown Rice Flour	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Glutinous Rice Flour	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Nature

Conventional flour leads through broad raw-material availability, established milling infrastructure and competitive pricing. Organic rice flour commands premiums in natural-food retail, infant nutrition and branded gluten-free applications. Expansion depends on identity-preserved paddy supply, certified storage and protection against commingling.

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Value by nature, USD bn

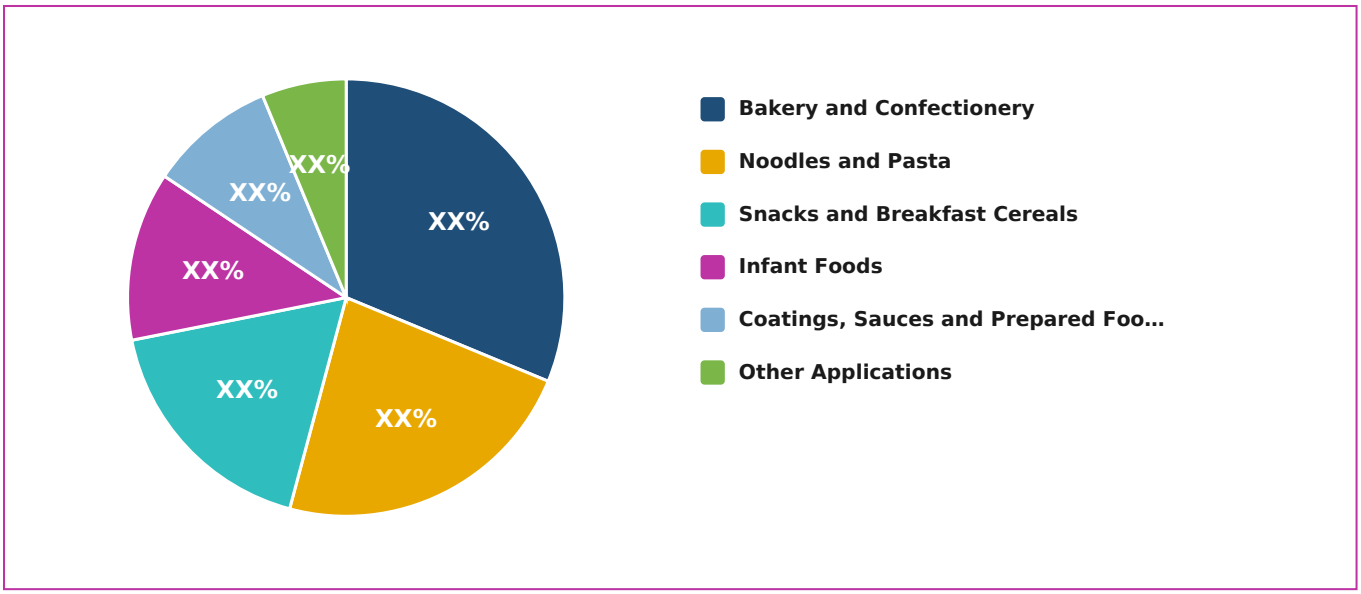
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Bakery and confectionery lead because finely milled rice flour provides neutral flavor, light color and useful crispness in bread, cakes, biscuits and pastry systems. Noodles and pasta remain the second-largest application, anchored by Asian consumption and growing gluten-free pasta ranges. Infant foods deliver the highest growth and unit value because qualification requires traceability, tight contaminant controls and consistent digestibility.

Value share by application, 2025



Source: XXX

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Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Bakery and Confectionery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Noodles and Pasta	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Snacks and Breakfast Cereals	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Infant Foods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Coatings, Sauces and Prepared Foods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Industrial business-to-business contracts dominate because bakery, noodle, snack and infant-food plants require bulk formats, technical documentation and repeatable specifications. Retail demand is smaller but supports higher per-kilogram realization through specialty baking, ethnic cooking and direct-to-consumer channels. E-commerce is widening consumer access to glutinous, brown, organic and ultrafine grades.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Business-to-Business	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail and E-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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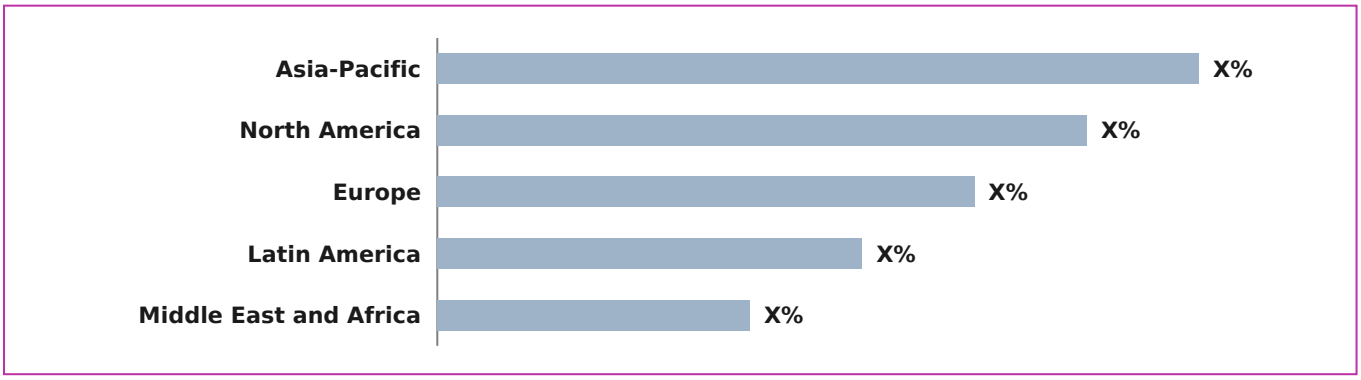
Rice Flour Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global rice flour revenue in 2025 and remains both the largest and fastest-growing region. China, India, Japan, Thailand, Vietnam and South Korea combine abundant rice supply with deeply established consumption of noodles, dumplings, confectionery and snacks. New demand is increasingly industrial: processors are specifying finer particle sizes, controlled amylose levels, gluten-management protocols and application-specific functionality rather than purchasing undifferentiated flour.

North America accounted for XX% of market value, supported by premium gluten-free bakery, natural-food retail, infant nutrition and clean-label ingredient systems. The United States is the region's anchor market, while Canadian demand benefits from high penetration of specialty and organic foods. Europe represented XX%, with Germany, the United Kingdom, France and Italy providing the principal demand centers and contaminant compliance, organic certification and traceability defining supplier access.

Latin America and the Middle East and Africa together represented XX% of global value in 2025. Brazil is developing a broader rice-flour bakery and snack ecosystem, while Mexico and the Gulf states rely more heavily on imported specialty ingredients. Nigeria, South Africa and other African markets offer a longer-term localization opportunity where rice processing, wheat-import substitution and urban packaged-food demand intersect.

Growth rate by region, 2025-2031



Source: XXX

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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

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Rice Flour Market Competitive Landscape and Company Share

The global rice flour market is fragmented, with the ten leading suppliers accounting for XX% of 2025 revenue. Scale leaders such as Ingredion, BENEO, Cargill and Ebro Foods compete through multinational account coverage, quality systems and formulation support, while specialist Asian millers compete through rice-variety access, efficient processing and proximity to noodle, snack and confectionery clusters.

Competitive advantage is shifting toward specification control. Suppliers are investing in ultrafine milling, pregelatinization, organic certification, dedicated gluten-free lines and contaminant-management systems. Product portfolios increasingly distinguish flour by particle size, amylose profile, gelatinization behavior, whole-grain content and intended application rather than selling a single general-purpose grade.

Consolidation will remain selective because local sourcing and culinary preferences favor regional producers. Transactions and strategic investments will concentrate on certified capacity, export-ready mills and technical-service capabilities, while downstream partnerships with bakeries, infant-food manufacturers and branded gluten-free producers will accelerate commercial qualification.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Ingredion Incorporated	XXX	XXX	XXX	XXX
BENEO GmbH	XXX	XXX	XXX	XXX
Cargill, Incorporated	XXX	XXX	XXX	XXX
Ebro Foods, S.A.	XXX	XXX	XXX	XXX
Archer-Daniels-Midland Company	XXX	XXX	XXX	XXX
Thai Flour Industry Co., Ltd.	XXX	XXX	XXX	XXX
Namisato Corporation	XXX	XXX	XXX	XXX
Koda Farms, Inc.	XXX	XXX	XXX	XXX
Bob's Red Mill Natural Foods, Inc.	XXX	XXX	XXX	XXX
Sage V Foods, LLC	XXX	XXX	XXX	XXX

Source: XXX

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Rice Flour Market Forecast and Commercial Opportunities

The market will add approximately USD XXX million in annual revenue between 2025 and 2031. The central forecast assumes steady rice availability, continued premiumization in gluten-free foods and wider industrial adoption of fine and functional rice flours. Volume growth will remain strongest in Asia-Pacific, while North America and Europe will contribute disproportionately to value growth through organic, infant-grade and application-engineered products.

The upside scenario is driven by faster wheat substitution, successful flour-specific rice cultivation programs and broader clean-label replacement of modified starches. A downside scenario would emerge from sustained rice-price inflation, export restrictions or tighter contaminant limits that reduce qualifying supply. Suppliers with multi-origin procurement and segregated processing are positioned to defend service levels under either scenario.

Winning strategies will combine raw-material control with formulation expertise. Mills that can document farm origin, manage inorganic arsenic and cross-contact risk, tailor particle-size distributions and help customers optimize finished-product texture will outperform commodity-focused competitors through 2031.

Opportunities

- High-protein, whole-grain and micronutrient-fortified rice flour
- Application-specific flour systems for bread, pizza and extruded snacks
- Certified organic and identity-preserved supply chains
- Premium infant-food-grade flour with farm-level traceability
- Regional processing hubs in South and Southeast Asia
- Upcycled flour made from specification-compliant broken rice
- Direct-to-consumer baking mixes and specialty culinary formats

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