



Global Sunflower Seeds 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 34.3 bn
Forecast (2031)	USD 46.5 bn
CAGR (2021-2031)	5.2%
Study period	2021-2031
Largest region	Europe · 40.6%
Fastest-growing region	Asia-Pacific · 6.7%
Market concentration	Moderate
Licence	Individual / Company

The global sunflower seeds market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Crushing demand remains the industry's commercial anchor, while high-oleic premiums, herbicide-tolerant genetics and climate-resilient hybrids are reshaping grower economics. Europe accounted for XX% of 2025 market value, supported by the Black Sea production and processing complex, while Asia-Pacific will record the fastest regional growth at XX% annually. The report quantifies the market by seed use, oil chemistry, end use, cultivation system and geography, supported by production, trade, pricing and company-level analysis.

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Executive summary

The global sunflower seeds market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Crushing demand remains the industry's commercial anchor, while high-oleic premiums, herbicide-tolerant genetics and climate-resilient hybrids are reshaping grower economics. Europe accounted for XX% of 2025 market value, supported by the Black Sea production and processing complex, while Asia-Pacific will record the fastest regional growth at XX% annually. The report quantifies the market by seed use, oil chemistry, end use, cultivation system and geography, supported by production, trade, pricing and company-level analysis.

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

Key findings

- Global market value reached USD XXX billion in 2025 and will rise to USD XXX billion by 2031.
- The market will expand at a XX% CAGR between 2025 and 2031.
- USDA projects global sunflowerseed production at XXX metric tons in 2026/27, up XX% from XXX metric tons in 2025/26.
- USDA projects harvested area at XXX hectares in 2026/27, compared with XXX hectares in 2025/26.
- Global sunflowerseed exports are projected at XXX metric tons in 2026/27, while domestic consumption reaches XXX metric tons.
- Sunflower oil output is projected by USDA to reach XXX metric tons in 2026/27, reinforcing demand for crushing-quality seed.
- Europe generated XX% of 2025 market value, reflecting the scale of Black Sea production, crushing and export infrastructure.
- Crushing represented XX% of 2025 seed demand, while food and snack applications delivered the strongest margin structure.

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 Sunflower Seeds Market Trends and Growth Drivers

Sunflower seed economics are set at the intersection of crop yields, crushing margins, competing vegetable-oil prices and regional logistics. The crop's commercial center remains the Black Sea, but production growth in Kazakhstan and Argentina and stronger demand across Asia are creating a more distributed supply base. This redistribution supports trade resilience while intensifying competition for modern genetics and processing investment.

Value growth is separating from commodity volume growth. High-oleic and confectionery contracts reward chemistry, kernel quality, varietal purity and traceability, while herbicide-tolerant and disease-resistant hybrids lift seed expenditure per hectare. Suppliers able to link genetics, agronomy, contracted procurement and segregated storage capture a greater share of the resulting premium.

Weather remains the decisive swing variable. Drought tolerance supports sunflower's position in crop rotations, yet extreme heat during flowering, broomrape pressure and fungal disease can sharply alter regional supply. Diversified origin portfolios, shorter-maturity hybrids and stronger field diagnostics are therefore becoming core commercial capabilities.

Growth drivers

Crushing capacity expansion

Investment in crushing capacity converts locally grown seed into higher-value oil and meal while lowering the cost of moving bulky raw seed. The mechanism is strongest in Kazakhstan, Argentina, Eastern Europe and selected Asian import markets, where additional plants deepen local procurement and improve the grower's route to market.

High-oleic food demand

Food manufacturers and foodservice operators are increasing their use of high-oleic sunflower oil because its oxidative stability supports frying performance and longer product shelf life. Identity-preserved contracts transmit this demand back to growers through seed premiums and encourage dedicated hybrid acreage.

Climate-resilient hybrid adoption

Drought tolerance, earlier maturity and resistance to broomrape, downy mildew and major fungal diseases protect output under more volatile growing conditions. Seed companies that combine stress tolerance with high oil content raise expected revenue per hectare and support planting decisions in marginal zones.

Edible-oil import diversification

Governments and processors in edible-oil-deficit economies are diversifying supply away from a narrow dependence on palm or soybean oil. Sunflower oil's established consumer positioning strengthens crush demand and encourages domestic seed production where agronomic conditions permit.

Premium snack consumption

Roasted, flavored and dehulled sunflower kernels are gaining distribution through convenience, modern retail and online channels. Confectionery-grade seed commands a higher value per tonne and broadens the market beyond the economics of commodity crushing.

Traceable contracting and digital distribution

Digital ordering, production contracts and field-level traceability reduce transaction costs and improve access to certified genetics. These systems are particularly valuable for high-oleic and confectionery programs, where varietal purity and segregation determine the attainable premium.

Restraints

Weather-driven yield volatility

Sunflower tolerates dry conditions better than several competing oilseeds, but flowering-stage heat and prolonged moisture deficits still reduce seed set, oil content and yield. Greater production variability raises procurement risk for crushers and increases working-capital requirements across the chain.

Black Sea trade disruption

The concentration of production and processing around the Black Sea exposes the market to port disruption, insurance costs, infrastructure damage and changing export measures. Buyers respond through larger inventories and origin diversification, but these measures add cost and cannot immediately replace regional scale.

Substitute-oil competition

Abundant palm, soybean or rapeseed oil can weaken crusher margins and reduce the price processors can pay for sunflower seed. The pressure is greatest in price-sensitive markets where buyers readily reformulate and where high-oleic or non-GM differentiation is limited.

Farm input cost inflation

Hybrid seed, fertilizer, fuel, crop protection and financing costs raise the break-even yield required for sunflower cultivation. When relative returns favor maize, soybean or rapeseed, growers can shift acreage within a single planting cycle.

Sunflower Seeds Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Crushing capacity expansion	XXX	XXX	XXX
High-oleic food demand	XXX	XXX	XXX
Climate-resilient hybrid adoption	XXX	XXX	XXX
Edible-oil import diversification	XXX	XXX	XXX
Premium snack consumption	XXX	XXX	XXX
Traceable contracting and digital distribution	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Weather-driven yield volatility	XXX	XXX	XXX
Black Sea trade disruption	XXX	XXX	XXX
Substitute-oil competition	XXX	XXX	XXX
Farm input cost inflation	XXX	XXX	XXX

Source: XXX

Sunflower Seeds Market Segmentation Analysis

By Seed Use Class

Oilseed sunflower dominates because crushing absorbs most global production and connects seed value directly to vegetable-oil and meal economics. Confectionery seed earns a substantial quality premium through larger kernel size, appearance and processing specifications. Certified planting seed grows fastest as hybrid replacement, trait adoption and disease resistance raise expenditure per planted hectare.

Value by seed Use Class, USD bn

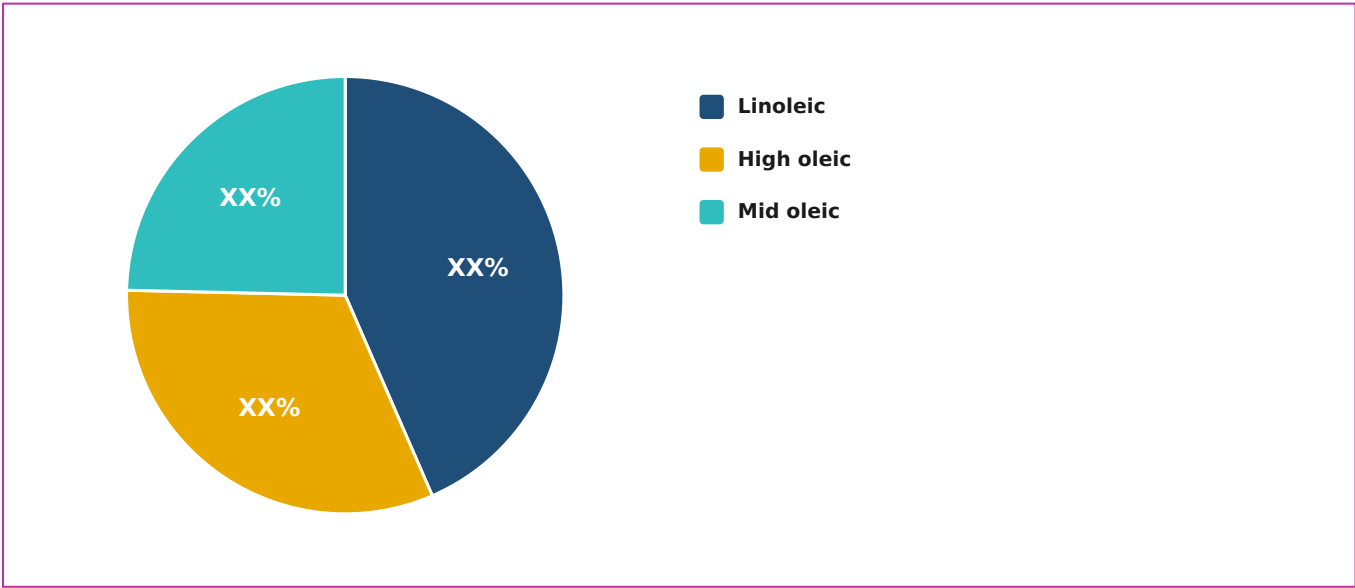
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Oilseed sunflower	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Confectionery sunflower	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Certified planting seed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Birdfeed and other specialty seed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Oil Chemistry

Conventional linoleic seed remains the production standard across the Black Sea, South America and much of Asia. High-oleic programs are expanding through processor contracts because the resulting oil offers stronger oxidative stability and supports premium frying and packaged-food applications. Mid-oleic seed occupies a smaller bridge category where buyers seek improved stability without the full identity-preserved premium.

Value share by oil Chemistry, 2025



Source: XXX

Value by oil Chemistry, USD bn

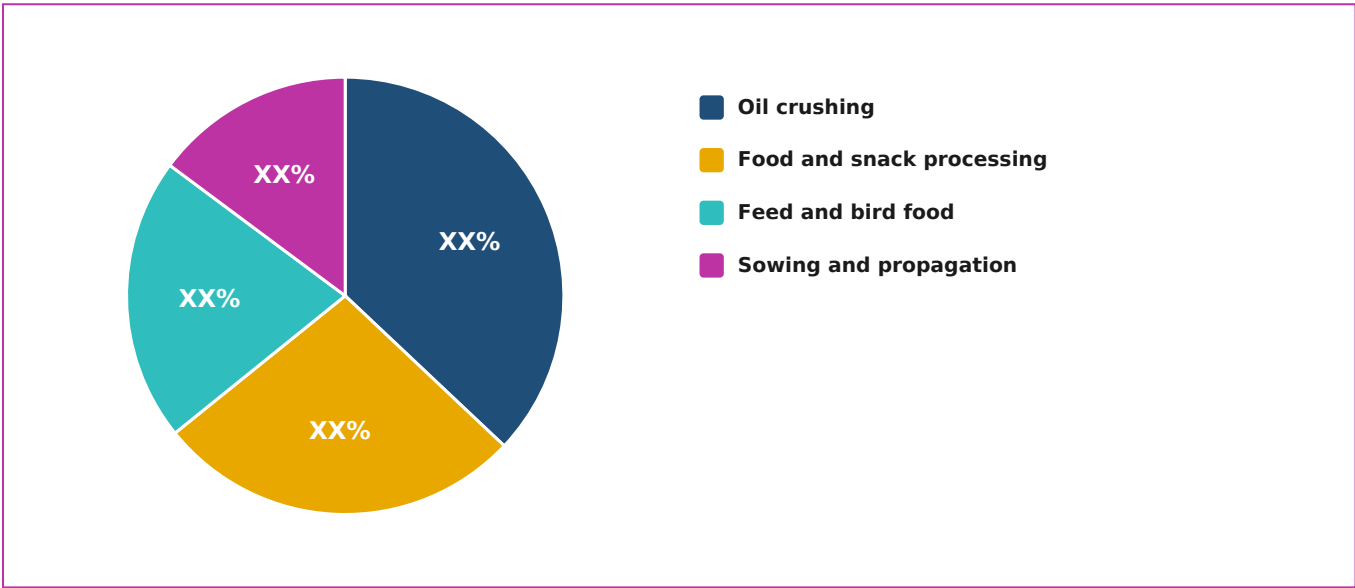
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Linoleic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
High oleic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Mid oleic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End Use

Crushing is the primary demand center because seed is converted into edible oil and protein-rich meal at industrial scale. Direct food and snack use is smaller in volume but benefits from higher-value grading, roasting, flavoring and kernel processing. Feed and bird-food demand provides an outlet for specialty types and off-specification lots, while sowing demand follows planted area and commercial hybrid intensity.

Value share by end Use, 2025



Source: XXX

Value by end Use, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Oil crushing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food and snack processing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Feed and bird food	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sowing and propagation	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Cultivation System

Conventional hybrids retain the lead through broad availability, high yield potential and established grower familiarity. Herbicide-tolerant systems are gaining share where difficult broadleaf weeds constrain production and approved technology packages provide reliable post-emergence control. Open-pollinated varieties remain important in price-sensitive and low-input production systems but lose share as commercial distribution expands.

Value by cultivation System, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional hybrids	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Herbicide-tolerant hybrids	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Open-pollinated varieties	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

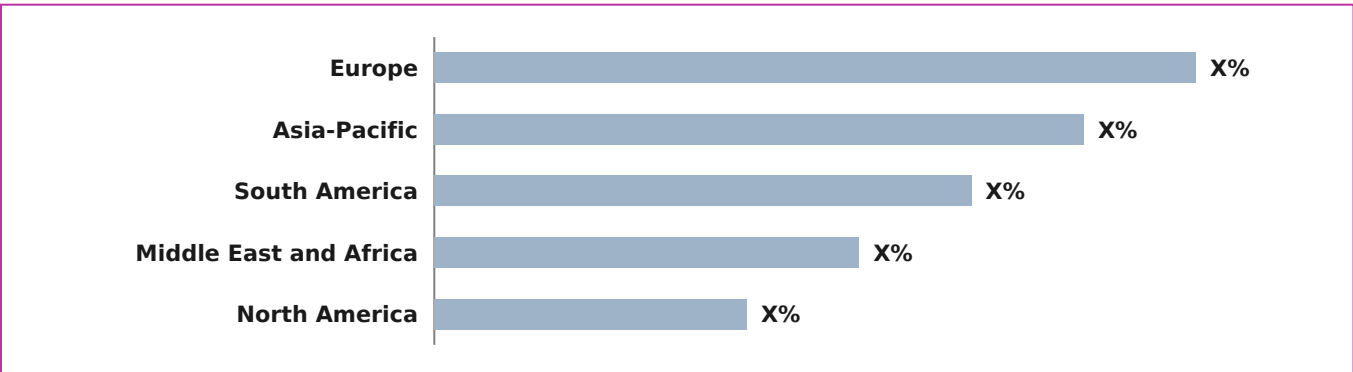
Sunflower Seeds Market Regional Analysis and Country Outlook

Europe held XX% of global market value in 2025, anchored by the integrated production, origination and crushing systems of Ukraine, Russia, the European Union and Türkiye. The region remains the principal price-setting center for sunflower seed and oil, while high-oleic contracting, advanced hybrid penetration and dense crushing infrastructure support above-average value realization. Romania, Bulgaria, Hungary, France and Spain provide the European Union's principal production base, with downstream demand strengthened by food processors seeking locally sourced vegetable oil.

Asia-Pacific will be the fastest-growing region at a XX% CAGR through 2031. China's large snack-seed category and oil demand, India's structural edible-oil deficit and Kazakhstan's rising production and processing capacity create several distinct growth pools. Regional buyers are increasing origin diversification, while domestic breeders, global seed companies and crushers compete to localize drought-adapted genetics and procurement networks.

South America combines Argentina's export-oriented crushing sector with expanding opportunities in Brazil. Argentina benefits from counter-seasonal supply and established oilseed logistics, while Brazil's demand base and crop-rotation options support gradual acreage gains. North America remains a smaller but high-value market built around confectionery seed, bird food, specialty oil and high-oleic contracts; the Middle East and Africa offer longer-term upside through snack consumption, edible-oil substitution and production growth in Tanzania and South Africa.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
South America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	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

Sunflower Seeds Market Competitive Landscape and Company Share

The sunflower seeds market has moderate concentration across organized origination, processing and proprietary genetics, while primary farm production remains fragmented. Bunge, Cargill, Louis Dreyfus Company, ADM, Viterra, COFCO International, Kernel and MHP influence commercial seed flows through procurement, storage, crushing and export networks. Syngenta, Corteva, Limagrain, BASF, Nuseed, KWS, Advanta and RAGT shape planting decisions through genetics, trait systems and agronomic support.

Competitive advantage is moving beyond headline yield toward a package of oil content, drought resilience, maturity fit, broomrape resistance, downy-mildew tolerance and herbicide compatibility. Syngenta strengthened its Spanish position by consolidating Koipesol hybrids under the Syngenta brand, while Corteva expanded Pioneer offerings for Ukrainian growers and combined new hybrids with local field testing and digital ordering.

Capacity and portfolio strategies increasingly converge around identity-preserved supply. Crushers seek high-oleic and traceable volumes under contract, seed developers localize trials for climate and disease pressure, and merchants invest in storage segregation and risk management. Partnerships between growers, processors and genetics providers will therefore matter as much as outright corporate scale.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Bunge Global SA	XXX	XXX	XXX	XXX
Cargill, Incorporated	XXX	XXX	XXX	XXX
Louis Dreyfus Company	XXX	XXX	XXX	XXX
Kernel S.A.	XXX	XXX	XXX	XXX
Syngenta Group	XXX	XXX	XXX	XXX
Corteva, Inc.	XXX	XXX	XXX	XXX
Limagrain	XXX	XXX	XXX	XXX
Nuseed	XXX	XXX	XXX	XXX

Source: XXX

Sunflower Seeds Market Forecast and Commercial Opportunities

The market will advance from USD XXX billion in 2025 to USD XXX billion in 2031. Volume growth will be driven by recovering acreage, improved hybrid performance and additional crushing demand, while value growth will also reflect high-oleic, confectionery and verified-origin premiums. Asia-Pacific and South America will add share, although Europe will remain the largest regional market at the end of the forecast.

The central forecast assumes sustained investment in crushing, normalized access to Black Sea export corridors and continued substitution toward sunflower oil in food applications. An upside scenario emerges if 2026/27 production momentum supports rapid processing investment without eroding grower returns; a downside scenario centers on repeated heat stress, renewed logistics disruption and aggressive pricing from competing oils.

Winning suppliers will pair locally proven genetics with procurement certainty and downstream specification management. High-oleic segregation, documented varietal purity, residue compliance and field-level traceability will command a growing portion of industry margin, while undifferentiated seed remains more exposed to global oilseed price cycles.

Opportunities

- High-oleic identity-preserved production contracts
- Broomrape-resistant and herbicide-tolerant hybrid portfolios
- Expansion of crushing and storage capacity in Kazakhstan and South America
- Confectionery seed formats for Asian and Middle Eastern consumers
- Sunflower protein and dehulled-kernel ingredient supply chains
- Digital agronomy, field-level traceability and direct-to-farm seed commerce

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