

# Global Shortening Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GF54F245F433EN.html>

Date: January 2026

Pages: 167

Price: US\$ 4,480.00 (Single User License)

ID: GF54F245F433EN

## Abstracts

The global Shortening market size is expected to reach \$ 4990 million by 2032, rising at a market growth of 2.4% CAGR during the forecast period (2026-2032).

Shortening is an edible fat system designed to provide tenderness, flakiness, volume and process stability in baked goods and fried foods while contributing to shelf life and sensory appeal. It sits at the core of the bakery value chain because it controls dough handling, aeration, crumb structure and fat distribution in everything from industrial sandwich cookies to artisan pastries. Upstream, shortening producers rely mainly on refined vegetable oils such as palm, soybean, canola and sunflower, supplemented in some regions by tallow or lard and by emulsifiers, antioxidants and fat-structuring additives. Downstream, major users include industrial bakery and biscuit manufacturers, quick service restaurant chains, confectionery makers, snack and instant food processors, as well as household and small retail channels. Large buyers typically source through annual framework agreements or multi-year supply contracts, often with price formulas linked to underlying vegetable oil benchmarks, while small bakeries and caterers purchase via distributors or foodservice wholesalers. For mainstream commodity shortening, typical gross margins cluster around 22, reflecting modest product differentiation but meaningful scale, formulation and logistics advantages. Higher-margin niches appear in specialty bakery fats where performance and clean-label claims create technological and regulatory barriers, long qualification cycles and sticky customer relationships.

In the current market, global production is around 3933 k tons, with an average selling price of about 1013 USD per ton EXW basis. Supply is moderately concentrated. A small group of global agribusiness and specialty fat players such as Cargill, Archer Daniels Midland, Bunge, Wilmar and AAK dominate cross-regional supply of vegetable

shortening and bakery fats, while regional leaders like IFFCO, Namchow, Associated British Foods, Ventura Foods and various European bakery fat specialists hold strong positions in their home markets. The five largest suppliers together account for roughly two fifths of global revenue, and the leading ten groups capture close to two thirds, a pattern consistent with industry descriptions of the shortenings market as “moderately concentrated” with a handful of multinationals controlling a significant share and long tails of regional producers.

Demand is currently strongest in North America and Europe where industrial bakery production, frozen dough and foodservice channels are mature, while Asia Pacific including China is the fastest growing region as packaged bakery and modern retail formats expand.

Looking ahead to the 2025–2031 period, the fundamental growth trajectory of shortening will be tied to three interlocking forces: regulation, technology and cost. On the regulatory side, the global phase-out of partially hydrogenated oils and tightening limits on industrial trans fats have already pushed the industry toward non-PHO shortening based on palm fractions, interesterified blends and emulsified systems, and this direction will only intensify as more countries align with World Health Organization guidelines and broader nutrition policies.

Technologically, major producers are investing in structured fat systems that deliver pastry performance with lower saturated fat, better oxidative stability and enhanced process tolerance, for example next-generation palm-based bakery shortenings and highly specialized icing and donut frying shortenings.

Some global suppliers are also experimenting with digital tools and artificial intelligence for demand forecasting, formulation optimization and production scheduling, seeking to smooth volatility in vegetable oil markets and to design shortenings tailored to specific customer processes; this is a logical extension of existing R&D and operations practices even if public case studies remain limited. On the cost side, the shortening business remains exposed to swings in palm and soybean oil prices, biofuel competition for feedstocks, geopolitical disruptions in key producing regions and to rising expectations around deforestation-free supply chains and certification schemes such as RSPO.

Capital expenditure into refining, fractionation and specialty fat lines is substantial, and plant utilization must be managed across multiple fat systems, which constrains how quickly capacity can be added or repurposed. Taken together, these factors suggest a market that will continue to grow steadily with bakery, confectionery and processed food

demand, while gradually shifting toward higher-value, low-trans, clean-label and regionally tailored shortening solutions, rather than simply expanding as a bulk commodity volume play.

This report studies the global Shortening production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Shortening and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Shortening that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Shortening total production and demand, 2021-2032, (K MT)

Global Shortening total production value, 2021-2032, (USD Million)

Global Shortening production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Shortening consumption by region & country, CAGR, 2021-2032 & (K MT)

U.S. VS China: Shortening domestic production, consumption, key domestic manufacturers and share

Global Shortening production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Shortening production by Function, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Shortening production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Shortening market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Cargill, Archer Daniels Midland, Bunge, Wilmar International, AAK, Conagra Brands, IFFCO, Ventura Foods, Manildra Group, Associated British Foods, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices

used in analyzing the World Shortening market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) by manufacturer, by Function, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

### **Global Shortening Market, By Region:**

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### **Global Shortening Market, Segmentation by Function:**

All Purpose Shortening

Bread Frying Shortening

Cake Icing Shortening

Pastry Layering Shortening

Filling Cream Shortening

Other Functional Shortening

#### Global Shortening Market, Segmentation by Physical Form:

Block Shortening

Fluid Shortening

Flaked Shortening

Other Forms

#### Global Shortening Market, Segmentation by Source:

Vegetable Shortening

Animal Shortening

Blended Shortening

Other Specialty Shortening

#### Global Shortening Market, Segmentation by Application:

Industrial Bakery Manufacturing

Foodservice Bakery and Catering

Confectionery and Sweet Fillings

Processed Food and Savory Products

Household and Small Retail

## Other Applications

### Companies Profiled:

Cargill

Archer Daniels Midland

Bunge

Wilmar International

AAK

Conagra Brands

IFFCO

Ventura Foods

Manildra Group

Associated British Foods

Fuji Oil

Namchow Chemical

J M Smucker

Zeelandia

Puratos

Premium Vegetable Oils

Musim Mas

Princes

Olenex

Yildiz Holding

Cofco Oils

ICC Group

**Key Questions Answered:**

1. How big is the global Shortening market?
2. What is the demand of the global Shortening market?
3. What is the year over year growth of the global Shortening market?
4. What is the production and production value of the global Shortening market?
5. Who are the key producers in the global Shortening market?
6. What are the growth factors driving the market demand?

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