

Global Non-hydrogenated Vegetable Fat Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Non-hydrogenated Vegetable Fat market size was valued at US\$ 239853 million in 2025 and is forecast to a readjusted size of US\$ 289366 million by 2032 with a CAGR of 2.8% during review period.

Non-hydrogenated vegetable fat refers to edible oils and structured plant fat systems that achieve the required melting profile and functionality without partial hydrogenation, thereby avoiding industrial trans fatty acids while still delivering plasticity, aeration, and heat stability. In the value chain it has effectively replaced partially hydrogenated oils in most regulated markets, becoming the default lipid backbone for retail cooking oils, foodservice frying media, bakery shortenings and margarines, and a wide range of confectionery, dairy alternative, and processed food applications. Upstream, supply is anchored by large-scale crushing and refining of palm, soybean, rapeseed, sunflower, coconut, palm kernel and other vegetable oils, combined with fractionation, interesterification, and blending technologies to tailor melting curves and crystallization behaviour. Downstream, key users include consumer brands, foodservice operators, and industrial manufacturers of bakery, confectionery, snacks, spreads, and ready meals, together with a smaller but relevant share into oleochemical chains where “non-hydrogenated” is part of a brand or sustainability proposition. Typical procurement follows annual framework agreements or multi-year supply programs, often combining bulk oil, specialty fats, and technical support in a single package.

In the current market, global production is around 220 million metric tons, with an average selling price of about 1050 USD per metric ton on an EXW basis, consistent with the composite of major vegetable oil prices over recent years. After the decisive

regulatory push against industrial trans fats – including the US FDA determination that partially hydrogenated oils are no longer generally recognized as safe and similar limits in the European Union that cap industrial trans fats at 2 g per 100 g of fat – producers overhauled portfolios toward non-hydrogenated palm and soft seed solutions, often using fractionation and interesterification rather than hardening.

The supplier base shows a mix of global agribusiness majors and specialized fat companies: by value, the top 5 suppliers (Cargill, Archer Daniels Midland, Bunge, Wilmar and one or two other large integrated palm groups) together control roughly 40% of global revenue, while the top 10 extend coverage to around 60%, reflecting both scale economies in crushing/refining and high concentration in palm-based specialty fats.

Demand remains heavily weighted toward Asia, where palm-based systems dominate, with Europe and North America still representing large but more mature markets focused on canola, sunflower and high-oleic solutions. Typical gross margins for non-hydrogenated vegetable fats cluster around 15% at the product-line level, once raw material exposure and trading-based earnings are stripped out. Margins are generally lower for commoditized refined oils sold into retail and bulk foodservice, and higher for specialty bakery and confectionery fats where know-how in crystallization behaviour, texture control, shelf life, sensory performance and clean-label positioning creates differentiation. Entry barriers arise from capital-intensive crushing and refining assets, secure access to oilseed and palm feedstock, complex certification requirements around food safety, sustainability (RSPO, ISCC, national deforestation rules) and nutrition claims, plus long qualification cycles with major food multinationals. In recent years, leading players have begun integrating AI-enabled demand forecasting, dynamic pricing, process control and formulation optimization into their operations, using machine learning to tune blends to regional sensory preferences and to balance cost, functionality, and nutritional profiles in near real time.

Looking ahead to 2026–2032, overall volume growth is expected to be modest but steady as global population, urbanization and out-of-home eating continue to rise, offset in part by fat-reduction and health trends in some mature markets. Palm and palm-based specialty fats will likely retain a strong cost and functionality position in bakery, confectionery and frying applications, while high-oleic soft oils gain share where oxidative stability and label perception are critical. Regulatory pressure on saturated fat, sustainability constraints on palm expansion, and evolving national nutrition labeling standards will all shape the mix of base oils and processing routes. At the same time, plant-based dairy and meat alternatives, as well as premium bakery and confectionery

products, are driving demand for more sophisticated non-hydrogenated structures, including enzyme-interesterified systems and tailored lauric blends. Capacity expansion will be constrained in regions where new palm development faces environmental and social scrutiny, pushing investment toward yield improvement, refinery debottlenecking and higher value-added downstream fat systems rather than pure volume. Overall, non-hydrogenated vegetable fat is set to remain the central fat platform of the global food industry, but with increasing emphasis on traceability, sustainability credentials, and digital tools – including AI-driven process optimization – to manage volatility in crops, energy and logistics.

This report is a detailed and comprehensive analysis for global Non-hydrogenated Vegetable Fat market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Base Oil Family and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Non-hydrogenated Vegetable Fat market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Non-hydrogenated Vegetable Fat market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Non-hydrogenated Vegetable Fat market size and forecasts, by Base Oil Family and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Non-hydrogenated Vegetable Fat market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries
To assess the growth potential for Non-hydrogenated Vegetable Fat

To forecast future growth in each product and end-use market
To assess competitive factors affecting the marketplace

This report profiles key players in the global Non-hydrogenated Vegetable Fat market based on the following parameters - company overview, sales quantity, revenue, 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, COFCO, Musim Mas, Apical, Sime Darby Oils, Golden Agri-Resources, Mewah Group, etc.

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

Market Segmentation

Non-hydrogenated Vegetable Fat market is split by Base Oil Family and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Base Oil Family, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Base Oil Family

Palm Based Fats

Lauric Based Fats

Soft Seed Oil Based Fats

Blended Multi Oil Fats

Other Vegetable Fats

Market segment by Processing Route

Refined Liquid Oils

Physically Structured Fats

Interesterified Specialty Fats

Emulsified Spreads and Margarines

Spray Dried and Encapsulated Fats

Market segment by Physical State

Liquid Oils

Pumpable Semi Solid Fats

Plastic Bulk Fats

Powdered and Encapsulated Fats

Market segment by Application

Cooking and Salad Oils

Frying Media for Foodservice

Shortening Fat for Bakery

Filling and Topping Fat

Spreads and Structured Fats

Industrial and Oleochemical Uses

Major players covered

Cargill

Archer Daniels Midland

Bunge

Wilmar International

COFCO

Musim Mas

Apical

Sime Darby Oils

Golden Agri-Resources

Mewah Group

AAK

Fuji Oil

Vandemoortele

Upfield

IFFCO

Richardson International

Oleo-Fats

Olenex

Market segment by region, regional analysis covers
North America (United States, Canada, and Mexico)
Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)
Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)
South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Non-hydrogenated Vegetable Fat product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Non-hydrogenated Vegetable Fat, with price, sales quantity, revenue, and global market share of Non-hydrogenated Vegetable Fat from 2021 to 2026.

Chapter 3, the Non-hydrogenated Vegetable Fat competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Non-hydrogenated Vegetable Fat breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Base Oil Family and by Application, with sales market share and growth rate by Base Oil Family, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Non-hydrogenated Vegetable Fat market forecast, by regions, by Base Oil Family, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Non-hydrogenated Vegetable Fat.

Chapter 14 and 15, to describe Non-hydrogenated Vegetable Fat sales channel, distributors, customers, research findings and conclusion.

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