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Sunflower Oil Market Assessment, By Type [Linoleic Oil, Mid-Oleic Oil, High-Oleic Oil], By Product Type [Processed, Virgin], By Packaging Type [Plastic Containers, Bottles and jars, Pouches, Metal Cans, Drums, Others], By Application [Food, Animal Feed, Biofuels, Cosmetics, Nutraceutical, Horticulture, Others], By Pack Size [Less than 1 Litres, 1 Litres-5 Litres, More than 5 Litres], By End-user [Residential, Institutional, Industrial], By Distribution Channel [Direct/Institutional Sales, Supermarkets and Hypermarkets, Convenience Stores, Franchise Outlets, Modern Trade, Online Retail, Others], By Region, Opportunities, and Forecast, 2016-2030F

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Abstracts

Global sunflower oil market size was valued at USD 25.6 billion in 2022, expected to reach USD 38.49 billion in 2030, with a CAGR of 5.23% for the forecast period between 2023 and 2030. The market for sunflower oil is expanding rapidly as more people become aware of its many culinary uses and health advantages. Sunflower oil, which has a high concentration of heart-healthy monounsaturated fats and a low saturated fat content, is becoming increasingly popular as cooking oils become healthier. As consumers prioritize clean-label options, the market is also impacted by the growing demand for natural and organic products. The expanding food industry and the rising use of sunflower oil in food products also propel market expansion.

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Geographically, Russia and Ukraine are home to significant sunflower oil producers and exporters. Both the nations together produce more than 50% of the global sunflower oil. However, market participants must consider obstacles like raw material price volatility and competition from alternative oils. The market for sunflower oil is expected to grow steadily due to consumer preferences prioritizing health and the world's culinary scene. Total global sunflower oil production stood at 21,849 metric tons in 2022, as per the National Sunflower Association.

Growing Recognition of Health Benefits Propels Sunflower Oil Market

The market for sunflower oil is rising noticeably as more people become aware of the health benefits of polyunsaturated fatty acids (PUFA). Growing research indicates that cooking oils high in monounsaturated fatty acids (MUFA) and polyunsaturated fatty acids (PUFA) are associated with higher levels of 'good cholesterol' (HDL). The market is expanding due to the FDA's (Food and Drug Administration) recognition that edible oils containing at least 70% oleic acid can lower the risk of coronary heart disease. With the growing global population and shifting consumer preferences, sunflower oil is being used more in processed foods commercially. The Food and Agriculture Organization (FAO) has projected that by 2050, sunflower seed oil production will reach 60 million tonnes, indicating an increase in per capita consumption and highlighting the essential role sunflower oil plays in the ever-changing culinary scene.

Sunflower Oil's Pivotal Role in Sustainable Biodiesel Production Surge Market Demand

The increasing need for substitute biofuels due to the depletion of fossil fuel reserves has brought sunflower oil to the forefront as a crucial component in biodiesel manufacturing. Sunflower seeds yield about 600 pounds of oil per acre and are superior to soybeans due to their high oil content. Because of its abundance, sunflower oil is a recommended feedstock for biodiesel and can be grown on both small and large farms. Its increasing popularity is highlighted because it is both economically viable and simple to cultivate. The addition of sunflower oil to biodiesel offers a sustainable solution and makes it easier to recycle leftover cooking oil, making it a more environmentally friendly fuel option with reduced emissions of pollutants. Sunflower oil's crucial role in biodiesel production makes it a major factor driving market expansion.

For instance, according to the National Sunflower Association, sunflower oil leads a premium over soybean and canola oils in the U.S. market due to high demand from the food processing industry. This price premium may pose challenges for using sunflower oil in biodiesel production. Additionally, sunflower seeds boast a high oil content, with

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average yields producing around 600 pounds of oil per acre, significantly more than soybeans. There is growing interest in establishing small-scale processing facilities for sunflower biodiesel production in local areas. However, it is crucial to meticulously analyze processing equipment, especially for smaller 'press-only' facilities. In many cases, a portion of the oil remains in the by-product meal, reducing economic efficiency. Therefore, careful consideration and evaluation are essential for ensuring the viability and success of such ventures.

Diverse Applications of Sunflower Oil Beyond Culinary Sphere

The market for sunflower oil is expanding rapidly due to its many uses outside of the culinary arts. Beyond its customary use in food products, sunflower oil has a millennium-long history and is acknowledged as an essential vegetable oil. It is frequently used in baking, snack foods, and health supplements, but it is also utilized in non-food sectors like industrial operations, fuel production, and the formulation of paints and coatings. Different types, including linoleic, mid-oleic, and high oleic, meet different needs and have different qualities and advantages. This wide range of uses highlights sunflower oil's critical function as a catalyst for market expansion, highlighting its adaptability and significance across a variety of industries. Notably, sunflower oil is now widely used in cosmetics and personal care products, including facial and body emulsions.

The versatility of sunflower oil is recognized as it helps in detaining, exfoliating, and unclogging the pores of skin. Additionally, it contains acids such as Linoleic which is known for its skin lightening properties that contributes to reducing melanin production and reducing hyperpigmentation. Furthermore, it contains vitamin-E which acts as a protection to skin. The ingredients highlight the significance of the sunflower oil beyond its traditional usage in the cooking for food application, with the growing emphasis in cosmetic and personal care industry. In September 2022, Strahl & Pitch introduced a vegan alternative in its cosmetic and personal care range by including sunflower wax in its formulations, which is prepared by the winterization of sunflower oil.

Impact of COVID-19

The COVID-19 pandemic profoundly affected the sunflower oil market, altering consumer behavior and industry dynamics in both the short and long term. Production and distribution channels were hampered in the early stages of the pandemic by labor shortages, travel restrictions, and disruptions in the supply chain. Uncertainties and shifting market dynamics caused a brief drop in demand as people prioritized necessities. But as the pandemic continued, a notable trend showed up: consumers'

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attention turned increasingly toward wellness and health. Through its low saturated fat content and wide range of culinary uses, sunflower oil has seen a rise in demand for cooking oils that are thought to be healthier. The trend toward cooking at home during lockdowns increased demand for this product.

On the supply side, persistent problems with labor shortages and logistics impacted production capacities. Furthermore, the pandemic's economic effects shaped consumer preferences and purchasing power, resulting in a long-term trend toward healthier cooking oils. The sunflower oil market is positioned to benefit from these changing consumer trends as the world navigates the post-pandemic era, with a focus on health-conscious choices and a persistent demand for adaptable, premium cooking oils.

Impact of Russia -Ukraine War

Major supplier of sunflower oil, Ukraine, experienced an abrupt global oil shortage in 2022 due to the Russian invasion. Food processors had to look for substitute oils through the shortage, and palm oil emerged as the most popular option despite sustainability issues. Due to the sharp rise in global prices, the crisis substantially affected the competition for vegetable oils from developing nations, especially those that produced coconut and palm oil.

Because of the war, there is a shortage of sunflower oil, which has resulted in higher prices overall. Ukraine accounts for 45–55% of the world's supply of sunflower oil, with Russia contributing the remaining 15–25%. The ripple effect of vegetable oil prices makes the market for vegetable oil more intensely competitive, even though developing countries produce a variety of oils. The conflict's aftermath is predicted to keep prices high through 2022 and 2023, changing the global market dynamics for different vegetable oils.

However, the European Bank of Reconstruction and Development (EBRD) aims to lend USD 90 million to one of Ukraine's leading edible oil producers, MHP Group, to support sunflower oil production in the country.

Key Players Landscape and Outlook

Key players who shape the market's dynamics and outlook are present in the global sunflower oil market, which defines its characteristics. Important roles are played in the market by well-known corporations like ADM, Cargill, Incorporated., Wilmar International Ltd, and Kernel, a few of the variables that significantly affect market dynamics are

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shifts in consumer preferences for healthier cooking oils, weather conditions that impact sunflower cultivation, and geopolitical events. The market environment is further diversified by the growing trend of using sunflower oil in non-food applications like biodiesel and cosmetics. The market is expected to show resilience and continued growth despite sporadic challenges like supply chain disruptions and geopolitical tensions affecting major sunflower oil-producing regions like Ukraine and Russia. This growth will be driven by the persistent consumer preference for healthier cooking options and the market's versatility across various industries. The market for sunflower oil is expected to continue evolving, with innovation, sustainability, and adaptability playing major roles in shaping its future course.

In February 2023, Cargill announced the launch of its sunflower oil brand- Gemini Pureit, which is set to be available across stores in South India’s four states, namely Telangana, Karnataka, Andhra Pradesh, and Tamil Nadu. South India consumes nearly two-thirds of the country’s sunflower oil. Manufacturers have a great opportunity to tap the market potential in the region which is still underserved.

Cargill , Inc. announced in January 2022, the opening of its first innovation center in India, located in Gurugram, Haryana. With a sensory lab, demonstration kitchen, and an area of almost 17,000 square feet, the innovation centre integrates the company's knowledge of various industry sectors, such as edible oils, specialty fats, starches, sweeteners, texturizers, and other food ingredients.

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