

# Rice Oil Market Outlook 2026-2034: Market Share, and Growth Analysis By Type (Extraction, Squeezing), By Application (Food, Cosmetic, Industry, Others)

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## Abstracts

The Rice Oil Market is valued at USD 7.92 billion in 2025 and is projected to grow at a CAGR of 3.2% to reach USD 10.52 billion by 2034.

### Rice Oil Market

Rice oil - predominantly extracted from rice bran and germ - is valued for its neutral flavor, high smoke point, and a balanced profile of unsaponifiables such as  $\gamma$ -oryzanol, tocopherols, and tocotrienols that support oxidative stability and functional positioning. Core end-uses span household cooking and foodservice frying; packaged foods and bakery shortenings; nutraceuticals and fortified foods; and personal-care formulations leveraging emolliency and antioxidant content. Trends include premiumization around cold-pressed and minimally refined variants, clean-label claims, and packaging that improves light and oxygen barriers. Demand is propelled by the shift toward high-stability frying oils, the rise of better-for-you snacks, and brand owners' interest in non-GMO and allergen-sensitive alternatives. Supply dynamics are shaped by integration with rice milling, solvent-extraction and physical refining upgrades, deodorization controls to protect flavor, and valorization of by-products into feed, waxes, and specialty fractions. The competitive landscape features integrated rice millers, edible-oil majors with multi-seed portfolios, regional refiners serving foodservice, and specialty players supplying nutraceutical and cosmetic grades; differentiation rests on bran sourcing consistency, refining yields, contaminant management, and documented stability performance. Key challenges include variability in bran quality due to milling logistics and lipase activity, compliance with evolving contaminant thresholds, and the need to balance commodity volumes with specialty fractions. Overall, the market is maturing from price-led bulk oil to a tiered portfolio where verified quality, functional positioning,

and sustainability claims enable margin capture across culinary, wellness, and personal-care channels.

## Rice Oil Market Key Insights

Integration with rice milling is the structural advantage. Freshness of bran after milling determines free-fatty-acid rise and downstream refining severity. Operators that stabilize bran rapidly - through heat treatment or immediate extraction - preserve yield and flavor, lowering neutral oil loss and refining costs. Co-location with mills reduces logistics time, secures bran supply during harvest peaks, and enables tighter quality specs. This integration also improves traceability and supports sustainability narratives from paddy to bottle, aligning with retailer audits and brand owner requirements.

Refining technology is the gatekeeper of quality and compliance. Modern physical refining, optimized deodorization, and careful bleaching earth selection help manage color, flavor volatiles, and contaminants. Plants running multi-effect deodorization and precise temperature control retain more unsaponifiables while achieving stable sensory outcomes. Process analytics tied to peroxide and anisidine indices reduce batch variability and complaints. Vendors that publish robust contaminant management practices and maintain rapid corrective-action protocols become preferred partners for multinational buyers and foodservice chains.

Functional actives enable premium tiers and cross-category demand. ?-Oryzanol and tocotrienols underpin claims in heart-healthy positioning, oxidative defense, and skin-barrier support. Fractionation and standardization create ingredients for nutraceutical softgels, functional beverage emulsions, and cosmetic serums. Food brands highlight stability and clean taste in snacks and ready-to-eat segments. Suppliers that can deliver specification-locked active levels and provide supportive documentation accelerate regulatory reviews and retailer acceptance for value-added SKUs.

High-stability frying performance anchors foodservice loyalty. Rice oil's thermal stability and neutral flavor favor quick-service restaurants and central kitchens seeking longer fry life and consistent sensory outcomes. Closed-loop oil management, filtration SOPs, and telemetry on polar compounds extend change-out intervals. Contracting models that bundle bulk supply, quality testing, and used-oil collection deepen account stickiness. Foodservice buyers prize

predictable deliveries, tote logistics, and training, often outweighing minor list-price differences across suppliers.

Clean-label and allergen-sensitive narratives expand household adoption. Non-GMO positioning, minimal aroma, and compatibility with a range of cuisines make rice oil an easy pantry upgrade. Packaging in opaque PET, aluminum cans, or bag-in-box improves shelf stability and kitchen safety. Retailers educate on high-heat applications and flavor neutrality versus strongly flavored seed oils. Brands that standardize harvest dating, origin cues, and storage guidance reduce returns and build trust with newer consumers discovering the category.

By-product valorization strengthens unit economics and ESG. Rice bran wax feeds confectionery and cosmetic bases; meal and defatted bran support feed and fortified foods; distillates provide nutraceutical actives. Plants that monetize these streams hedge commodity swings and demonstrate circularity. Energy recovery and wastewater treatment improvements further reduce footprints. Transparent reporting on by-product utilization increasingly factors into retailer ESG scorecards and institutional RFPs, conferring an advantage to integrated processors.

Supply security depends on bran quality logistics and seasonality hedging. Rain patterns, storage conditions, and lipase activity can degrade bran rapidly, increasing free-fatty-acids and refining loss. Stabilization capacity, nitrogen blanketing, and decentralized collection points mitigate risk. Multi-origin procurement across major rice-growing belts balances crop variability. Strategic inventories and flexible contracts help brand owners avoid reformulations during tight harvests, protecting shelf programs and promotional calendars.

Private label and co-packing shape the mid-market. Retailers deploy tiered offerings - standard refined, high-stability blends, and premium cold-pressed - each with distinct packaging and sensory promises. Scorecards track fill rates, complaint ratios, and corrective-action speed. Suppliers co-develop planograms and shopper education content, demystifying frying versus finishing use. Co-packing success hinges on agility, label compliance, and rapid flavor troubleshooting, especially during promotional spikes and seasonal displays.

Cosmetic and personal-care grades create diversified margin pools. Refined, low-odor fractions and winterized variants integrate into hair oils, body oils, and creams, valued for emolliency and rapid absorption. Documentation on INCI,

allergens, stability, and contaminant controls accelerates approvals with beauty retailers and pharmacy chains. Cross-utilization of actives from distillates deepens participation in high-margin categories. Long-term partnerships with contract manufacturers lock in predictable offtake beyond culinary cycles.

Sustainability verification is moving from optional to required. Buyers increasingly request evidence of responsible sourcing, energy management, and waste minimization from mill to refinery. Traceability systems, supplier audits, and third-party attestations shorten procurement cycles. Lightweight packaging and transport optimization cut emissions per liter delivered. Brands that link measurable impact to quality outcomes - longer fry life, lower waste, consistent flavor - sustain premium positioning through scrutiny and shifting regulations.

## Rice Oil Market Regional Analysis

### North America

Adoption is driven by foodservice seeking stable, neutral frying performance and by retail consumers shifting toward clean-label, high-heat oils. Importers and domestic refiners balance multi-origin supply with quality controls to ensure flavor consistency across seasons. Private label expands shelf presence with tiered packaging and educational cues. Snack and prepared-foods manufacturers leverage stability and neutral taste in reformulations, while beauty brands trial refined fractions for emollient bases. Distributors emphasize tote logistics, used-oil collection, and compliance documentation to win chain accounts.

### Europe

Retail growth is paced by health-aware consumers and specialty grocers adding alternative high-heat oils to assortments. Food manufacturers evaluate rice oil for stability in bakery and snack lines, managing allergen and flavor neutrality requirements. Stringent contaminant thresholds and labeling rules elevate the importance of advanced refining and auditable traceability. Sustainability narratives around circular by-products and energy efficiency strengthen tender outcomes. Cosmetics and pharmacy channels adopt refined cosmetic grades where odor and color control are critical.

## Asia-Pacific

As a major rice-milling region, APAC anchors supply and innovation from bran stabilization to advanced refining. Household and foodservice usage is entrenched in several markets, supported by strong distribution and price familiarity. Snack, instant foods, and bakery segments integrate rice oil for stability and clean flavor, while nutraceuticals emphasize  $\gamma$ -oryzanol content. Regional beauty markets adopt refined cosmetic fractions in hair and skin oils. Producers invest in energy-efficient deodorization, logistics for fresh bran collection, and diversified offtake into value-added streams.

## Middle East & Africa

Modern trade, hospitality, and quick-service operators favor high-stability frying solutions with predictable flavor. Import-reliant markets prioritize suppliers that provide consistent quality, strong documentation, and reliable logistics through heat-stressed supply chains. Retail adoption grows through education on high-heat cooking and neutral taste across diverse cuisines. Beauty and personal-care categories selectively incorporate refined fractions. Procurement increasingly weights sustainability claims alongside performance in hospitality tenders.

## South & Central America

Urbanizing consumers and expanding foodservice footprints drive interest in stable, neutral frying oils. Regional refiners blend imports with local production where milling capacity exists. Retailers position rice oil as a versatile upgrade for high-heat cooking, supported by private-label tiers and bilingual packaging. Snack manufacturers and bakeries explore rice oil for clean flavor and oxidative stability, while personal-care brands test refined fractions in hair and body oils. Logistics reliability, service coverage, and quality troubleshooting determine long-term supplier selection.

## Rice Oil Market Segmentation

### By Type

Extraction

Squeezing

## By Application

Food

Cosmetic

Industry

Others

## Key Market players

AWL Agri Business (Fortune/King's), Cargill, King Rice Oil Group, Ricela Group of Companies, Emami Agrotech Ltd., Vaighai Agro, Tsuno Food Industrial Co., Ltd., RiceBran Technologies, A.P. Refinery Pvt. Ltd., Marico Limited (Saffola), BCL Industries Ltd., SVROil (SVR Gaia), Surin Bran Oil Co., Ltd., Patanjali Foods Ltd., Gemini Edibles & Fats India Ltd.

## Rice Oil Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modelling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends. Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behaviour are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

## Rice Oil Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption. Regional insights highlight the

most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

## Countries Covered

North America — Rice Oil market data and outlook to 2034

United States

Canada

Mexico

Europe — Rice Oil market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Rice Oil market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Rice Oil market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Rice Oil market data and outlook to 2034

Brazil

Argentina

Chile

Peru

\* We can include data and analysis of additional countries on demand.

## Research Methodology

This study combines primary inputs from industry experts across the Rice Oil value chain with secondary data from associations, government publications, trade

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databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

### Key Questions Addressed

What is the current and forecast market size of the Rice Oil industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

### Your Key Takeaways from the Rice Oil Market Report

Global Rice Oil market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Rice Oil trade, costs, and supply chains

Rice Oil market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Rice Oil market size, CAGR, and market share of key products, applications,

and end-user verticals, 2023-2034

Short- and long-term Rice Oil market trends, drivers, restraints, and opportunities

Porter's Five Forces analysis, technological developments, and Rice Oil supply chain analysis

Rice Oil trade analysis, Rice Oil market price analysis, and Rice Oil supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Rice Oil market news and developments

### Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

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Complimentary report update to incorporate the latest available data and the impact of recent market developments.

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