

Mustard Market - Global Industry Size, Share, Trends, Opportunity and Forecast, By Form (Seed, Powder, Oil, Paste), By Sales Channel (Hypermarkets/Supermarkets, Convenience Store/Grocery Stores, Online, Others), By Region & Competition, 2021-2031F

<https://marketpublishers.com/r/MB528682D8A3EN.html>

Date: January 2026

Pages: 185

Price: US\$ 4,500.00 (Single User License)

ID: MB528682D8A3EN

Abstracts

The Global Mustard Market is projected to expand from USD 6.98 Billion in 2025 to USD 9.89 Billion by 2031, exhibiting a CAGR of 5.98%. This market comprises the manufacturing and supply of pungent condiments extracted from Brassica plant seeds, marketed in various formats including oil, powder, and paste. A significant factor propelling this growth is the rising consumer preference for clean-label and organic food items, which drives manufacturers to employ mustard as a natural emulsifier and preservative. Additionally, the increasing application of mustard oil in therapeutic contexts, owing to its potent anti-inflammatory and antimicrobial characteristics, acts as a unique growth stimulant extending beyond traditional culinary uses.

Conversely, the industry encounters substantial hurdles due to the extreme volatility of raw material prices associated with erratic weather patterns in key cultivation areas. This environmental unpredictability frequently interrupts supply chains and hinders steady production, complicating inventory control for processors. For instance, the Solvent Extractors' Association of India estimated that mustard production in India would achieve a record 12 million tonnes in 2024. Such dependence on specific production centers emphasizes the global market's susceptibility to regional agricultural risks and climatic anomalies.

Market Driver

The escalating inclination toward plant-based and functional food ingredients acts as a major catalyst for the Global Mustard Market. As consumers actively search for non-animal protein alternatives and functional additives, mustard is becoming increasingly popular due to its substantial protein levels and therapeutic benefits. This tendency is especially apparent in the creation of plant-based meat substitutes and fortified foods, where derivatives of mustard seeds function effectively as binders and nutritional boosters. Corroborating this functional transition, recent agricultural findings underscore the crop's quality; the Canadian Grain Commission's May 2025 report, titled 'Quality of western Canadian mustard seed 2024', noted that yellow mustard seed samples possessed a mean protein content of 36.5%, highlighting their applicability for protein-dense food products.

Concurrently, the rising request for organic and clean-label condiments is transforming sourcing tactics throughout the sector. Food producers are increasingly substituting synthetic additives with mustard-derived ingredients to secure clean-label certifications, a shift that demands a steady supply of premium raw materials. This industrial necessity has prompted leading producers to increase output to guarantee market equilibrium. According to Statistics Canada's December 2024 'Production of Principal Field Crops' report, national mustard seed production was estimated at 192,297 metric tonnes, signaling a strategic adjustment to these growing market demands. Nevertheless, supply difficulties remain in other significant areas; the USDA's 'Crop Production 2024 Summary' from January 2025 confirmed United States mustard seed production at merely 102 million pounds for 2024, emphasizing the regional variations in meeting global needs.

Market Challenge

The intense volatility of raw material costs, stemming from erratic climatic conditions in primary cultivation zones, represents a critical obstacle for the Global Mustard Market. This environmental instability causes disruptions within the supply chain, generating considerable uncertainty for processors concerning the cost and availability of necessary feedstock. When unfavorable weather affects crop yields, manufacturers encounter sudden increases in input costs that are challenging to transfer to consumers without negatively impacting demand. As a result, this unpredictability diminishes profit margins and compels companies to focus on immediate inventory preservation rather than long-term market growth or product innovation.

Furthermore, reliance on distinct geographic centers exacerbates this fragility, as a

solitary regional weather event can precipitate global scarcities. Data from the Solvent Extractors' Association of India indicates that in 2025, rapeseed-mustard production is projected to reach 11.52 million tonnes, marking a 13% decrease from the prior year attributed to adverse field conditions. Such drastic variations impede the industry's capacity to assure reliable delivery to international purchasers, thereby directly hindering growth and adding complexity to the sourcing strategies needed to satisfy the escalating demand for natural preservatives.

Market Trends

The expansion of exotic and fusion flavor profiles has emerged as a prevailing trend, driven by consumer demand for sophisticated, premium condiments that enhance home-cooked meals. Manufacturers are addressing this by introducing gourmet mustard variants incorporating ingredients such as hot peppers, honey, and truffles, successfully expanding the category beyond traditional yellow and brown types. This transition toward value-added, flavorful products is reflected financially in the results of leading industry entities. For instance, McCormick & Company's '2024 Financial Results' from January 2025 reported a 4% increase in Consumer segment sales to \$1,085 million during the fourth quarter, growth attributed largely to favorable volume and product mix that mirrors the growing market desire for distinct flavor experiences.

At the same time, the shift toward flexible and eco-friendly packaging solutions is transforming product logistics and presentation to align with rigorous sustainability objectives. Brands are actively substituting rigid plastic containers with recyclable pouches and materials utilizing post-consumer resin to minimize environmental footprints and attract eco-aware consumers. Although this conversion necessitates substantial operational modifications, it provides long-term benefits in brand equity and compliance. As detailed in The Kraft Heinz Company's '2024 ESG Report' from December 2024, the corporation successfully launched a new sachet design in Europe containing 35% recycled content, a strategic initiative supporting its wider goal of decreasing virgin plastic consumption by 20% by 2030.

Key Market Players

Woeber Mustard Manufacturing Company

Unilever Plc

Boar's Head Brand

Wisconsin Spice, Inc.

Bertman Foods Co.

McCormick & Company, Incorporated

Conagra Brands, Inc.

The Kraft Heinz Company

M K Agrotech Private Limited

Emami Agrotech Ltd.

Report Scope

In this report, the Global Mustard Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Mustard Market, By Form

Seed

Powder

Oil

Paste

Mustard Market, By Sales Channel

Hypermarkets/Supermarkets

Convenience Store/Grocery Stores

Online

Others

Mustard Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Mustard Market.

Available Customizations:

Global Mustard Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL MUSTARD MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Form (Seed, Powder, Oil, Paste)
 - 5.2.2. By Sales Channel (Hypermarkets/Supermarkets, Convenience Store/Grocery Stores, Online, Others)
 - 5.2.3. By Region

- 5.2.4. By Company (2025)
- 5.3. Market Map

6. NORTH AMERICA MUSTARD MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Form
 - 6.2.2. By Sales Channel
 - 6.2.3. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Mustard Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Form
 - 6.3.1.2.2. By Sales Channel
 - 6.3.2. Canada Mustard Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Form
 - 6.3.2.2.2. By Sales Channel
 - 6.3.3. Mexico Mustard Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Form
 - 6.3.3.2.2. By Sales Channel

7. EUROPE MUSTARD MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Form
 - 7.2.2. By Sales Channel
 - 7.2.3. By Country

- 7.3. Europe: Country Analysis
 - 7.3.1. Germany Mustard Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Form
 - 7.3.1.2.2. By Sales Channel
 - 7.3.2. France Mustard Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Form
 - 7.3.2.2.2. By Sales Channel
 - 7.3.3. United Kingdom Mustard Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Form
 - 7.3.3.2.2. By Sales Channel
 - 7.3.4. Italy Mustard Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Form
 - 7.3.4.2.2. By Sales Channel
 - 7.3.5. Spain Mustard Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Form
 - 7.3.5.2.2. By Sales Channel

8. ASIA PACIFIC MUSTARD MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Form
 - 8.2.2. By Sales Channel

8.2.3. By Country

8.3. Asia Pacific: Country Analysis

8.3.1. China Mustard Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Form

8.3.1.2.2. By Sales Channel

8.3.2. India Mustard Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Form

8.3.2.2.2. By Sales Channel

8.3.3. Japan Mustard Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Form

8.3.3.2.2. By Sales Channel

8.3.4. South Korea Mustard Market Outlook

8.3.4.1. Market Size & Forecast

8.3.4.1.1. By Value

8.3.4.2. Market Share & Forecast

8.3.4.2.1. By Form

8.3.4.2.2. By Sales Channel

8.3.5. Australia Mustard Market Outlook

8.3.5.1. Market Size & Forecast

8.3.5.1.1. By Value

8.3.5.2. Market Share & Forecast

8.3.5.2.1. By Form

8.3.5.2.2. By Sales Channel

9. MIDDLE EAST & AFRICA MUSTARD MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Form

- 9.2.2. By Sales Channel
- 9.2.3. By Country
- 9.3. Middle East & Africa: Country Analysis
 - 9.3.1. Saudi Arabia Mustard Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Form
 - 9.3.1.2.2. By Sales Channel
 - 9.3.2. UAE Mustard Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Form
 - 9.3.2.2.2. By Sales Channel
 - 9.3.3. South Africa Mustard Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Form
 - 9.3.3.2.2. By Sales Channel

10. SOUTH AMERICA MUSTARD MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Form
 - 10.2.2. By Sales Channel
 - 10.2.3. By Country
- 10.3. South America: Country Analysis
 - 10.3.1. Brazil Mustard Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Form
 - 10.3.1.2.2. By Sales Channel
 - 10.3.2. Colombia Mustard Market Outlook
 - 10.3.2.1. Market Size & Forecast

- 10.3.2.1.1. By Value
- 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Form
 - 10.3.2.2.2. By Sales Channel
- 10.3.3. Argentina Mustard Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Form
 - 10.3.3.2.2. By Sales Channel

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

13. GLOBAL MUSTARD MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

- 15.1. Woeber Mustard Manufacturing Company
 - 15.1.1. Business Overview
 - 15.1.2. Products & Services
 - 15.1.3. Recent Developments
 - 15.1.4. Key Personnel

- 15.1.5. SWOT Analysis
- 15.2. Unilever Plc
- 15.3. Boar's Head Brand
- 15.4. Wisconsin Spice, Inc.
- 15.5. Bertman Foods Co.
- 15.6. McCormick & Company, Incorporated
- 15.7. Conagra Brands, Inc.
- 15.8. The Kraft Heinz Company
- 15.9. M K Agrotech Private Limited
- 15.10. Emami Agrotech Ltd.

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

I would like to order

Product name: Mustard Market - Global Industry Size, Share, Trends, Opportunity and Forecast, By Form (Seed, Powder, Oil, Paste), By Sales Channel (Hypermarkets/Supermarkets, Convenience Store/Grocery Stores, Online, Others), By Region & Competition, 2021-2031F

Product link: <https://marketpublishers.com/r/MB528682D8A3EN.html>

Price: US\$ 4,500.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/MB528682D8A3EN.html>