

Roasted Soybean Market Size, Share & Growth Report, H2-2026: Industry Outlook By Nature, By Form, By Flavor Profile, By Application, By Distribution Channel, Companies and Countries to 2032

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Abstracts

The global Roasted Soybean Market size is forecast to grow at a CAGR of 5.09% between 2026 and 2032. This Roasted Soybean report provides a comprehensive analysis across By Nature (Conventional, Organic), By Form (Whole, Splits, Flour), By Flavor Profile (Plain, Salted, Flavored), By Application (Food and Beverage, Bakery and Confectionery, Snacks and Convenience Foods, Plant-Based Dairy and Beverages, Animal Feed, Industrial Use), By Distribution Channel (Business-to-Business, Supermarkets and Hypermarkets, Specialty and Health Stores, Convenience Stores, Online Retail), across 5 geographic regions, and 22 countries.

High-Protein Snacking and Livestock Nutrition Sustain Roasted Soybean Demand

The global roasted soybean industry spans roasted whole soybeans, dry-roasted edamame, soy nuts, roasted soy ingredients, and feed-grade roasted beans used across snacks, plant-based nutrition, dairy cattle rations, livestock feed, and selected food-processing applications. Roasting improves flavor, reduces raw-bean notes, lowers anti-nutritional factors, and can alter protein availability depending on time and temperature. In consumer foods, demand is supported by high-protein, high-fiber, gluten-free, vegan, and low-carbohydrate snacking. In animal nutrition, roasted whole soybeans provide concentrated protein and fat and can increase rumen-undegradable protein when properly processed. Buyers therefore evaluate roasting uniformity, moisture, protein quality, oil retention, soybean variety, and origin. Non-GMO and organic sourcing are increasingly important in premium food applications, while high-

oleic soybeans are attracting interest where producers seek improved fat stability and nutritional functionality.

Flavor Diversification and High-Oleic Processing Expand Roasted Soybean Portfolios

Manufacturers are differentiating roasted soybeans through flavor innovation, high-oleic processing, and format expansion. Seapoint Farms currently markets dry-roasted edamame in sea salt and wasabi formats and has added fire-roasted variants, including Dill Pickle, extending soybeans into more conventional savory-snack occasions. The Only Bean has broadened its crunchy roasted edamame range across Sriracha, Buffalo, Ranch, and variety packs while emphasizing complete plant protein, fiber, non-GMO sourcing, and low net carbohydrates. In feed applications, Quality Roasting has expanded its focus on high-oleic soybeans, highlighting their higher monounsaturated-fat profile, stability, and potential value in dairy feeding systems. The company also procures conventional, organic, and high-oleic soybeans across its processing network. These strategies show roasted soybean suppliers developing both consumer-facing premium snacks and technically differentiated feed ingredients rather than treating roasted soy solely as a commodity.

Clean-Label Roasting, Non-GMO Sourcing, and High-Oleic Soybeans Shape Manufacturer Trends

Manufacturer-led trends are pushing roasted soybeans toward protein-forward snacking, cleaner labels, and more specialized feed nutrition. Consumer brands are using roasting instead of frying to support lower-oil positioning while combining soy's complete protein and fiber with familiar flavors associated with chips and nuts. Single-serve packs, resealable pouches, and variety formats are widening portability and portion control. Non-GMO, organic, vegan, gluten-free, and keto-oriented claims are being layered onto roasted edamame to compete with nuts, jerky, and protein snacks. In livestock nutrition, processors are placing greater emphasis on controlled heat treatment and high-oleic soybean genetics because both affect protein availability, fat stability, and ration economics. Traceable regional sourcing is also becoming more important as processors seek reliable soybean quality and closer farmer relationships. Product differentiation increasingly depends on roast consistency, nutritional functionality, flavor systems, and application-specific processing.

Shifting Consumer Expectations and Industry Transformation

Young and adult consumers across markets are increasingly scrutinizing products beyond price and brand, seeking greater visibility into ingredients or materials, their origin, manufacturing location, quality, sourcing practices, and environmental attributes. This is increasing the importance of ingredient lists, nutrition labeling, allergen declarations, certifications, sourcing information and other product claims, while also raising the bar for transparency and substantiation.

In addition, the industry is being reshaped by advances in AI, ingredient and formulation technologies, automation, digital commerce, packaging technology and data analytics, creating new opportunities to accelerate product development, improve product quality and optimize operations. However, these capabilities require higher capital commitments, particularly as companies invest in store expansion and refurbishment, automation, AI-enabled systems, digital infrastructure and other productivity-enhancing technologies.

Competitive dynamics are also shifting as private-label and disruptor brands raise value expectations across selected price points, pushing established players to sharpen their entry, core and premium propositions. Private-label expansion, adjacent-category opportunities, M&A and AI are consequently creating new avenues for growth for manufacturers, suppliers and other industry participants across both developed and developing markets.

Impact of Tariffs and Inflation Rates on Roasted Soybean Markets and Companies

Tariffs and elevated inflation are directly reshaping the cost structure and pricing strategies of Food & Beverages and Consumer Goods companies. The impact is particularly visible in imported ingredients and raw materials, packaging materials, energy, transportation, and other internationally sourced inputs, while higher consumer prices are increasing pressure on household purchasing decisions. The IMF WEO Data 2026 projects global headline inflation at 4.7% in 2026, while the continued use of tariffs and other trade measures is increasing uncertainty around sourcing and cross-border costs.

The report quantifies the impact of tariff changes and inflation on the market by analyzing country-level inflation trends, tariff exposure, import dependence, input-cost movements and pricing conditions, and assesses their implications for market volumes, revenues and margins.

Key Value-Creating Activities and Participants Across the Roasted Soybean

Industry Value Chain

Roasted Soybean value chains are becoming more cost-sensitive and closely integrated, with changes in input prices, sourcing concentration, production efficiency, packaging costs, logistics and channel economics directly influencing margins and competitive positioning at each stage.

The report maps the value chain from upstream suppliers to end-use channels, identifies the principal participants and value-adding activities at each stage, and assesses the relative importance of procurement, manufacturing, packaging, logistics, distribution and retail in the forecast period.

Roasted Soybean Pricing analysis- How Input Costs, Competition and Positioning Influence Roasted Soybean Market Pricing

Pricing analysis in the report establishes how prices differ across products, segments, countries and channels and what is driving those differences. The report provides historical and current price benchmarks, country-level and regional comparisons, product-level pricing, and an assessment of the principal factors influencing price movements.

Five forces analysis- How Competitive Forces Are Shaping the Roasted Soybean Industry

The chapter in the Roasted Soybean report evaluates competitive rivalry, threat of new entrants, bargaining power of suppliers, bargaining power of buyers, and threat of substitutes, with each force assessed against the market's actual operating conditions. It analyzes market factors including fragmentation, product differentiation, manufacturing and distribution requirements, switching costs, supplier concentration, raw-material availability, retailer purchasing power, and the ability of consumers to substitute between brands. The report also examines how e-commerce and marketplaces are lowering certain barriers to market access while intensifying price transparency, and how established distribution networks, brand recognition, scale and customer relationships continue to protect incumbents across categories.

Critical Success Factors- Key Factors Determining Competitive Success in the Roasted Soybean Industry

The report identifies the critical success factors that fuel growth in the Roasted Soybean

market, in addition to market trends and company capabilities. The Roasted Soybean report evaluates critical success factors against the market's competitive environment and assesses how leading participants are strengthening them. Further, the chapter identifies the factors with strongest influence on market-share retention, customer loyalty, pricing power, operating performance, and long-term competitive differentiation.

Segmentation analysis- How Demand Is Distributed Across Key Segments of the Roasted Soybean Market

The report analyzes the global and regional markets across key types, applications, and other segments from 2021 to 2025. Further, forecasts are provided from 2026 to 2032. Key segments included in the study are By Nature (Conventional, Organic), By Form (Whole, Splits, Flour), By Flavor Profile (Plain, Salted, Flavored), By Application (Food and Beverage, Bakery and Confectionery, Snacks and Convenience Foods, Plant-Based Dairy and Beverages, Animal Feed, Industrial Use), By Distribution Channel (Business-to-Business, Supermarkets and Hypermarkets, Specialty and Health Stores, Convenience Stores, Online Retail).

US Roasted Soybean Market - Strong Consumer Spending, Private-Label Expansion and Premium Product Demand

The US Roasted Soybean companies are focusing on value positioning, distribution strength, product differentiation, and operating efficiency as private-label products gain ground against national brands. The US store-brand sales reached \$282.8 billion in 2025, growing 3.3% versus 1.2% for national brands, while store brands reached a record 21.3% dollar share and 23.5% unit share according to the Private Label Manufacturers Association. The report provides the US Roasted Soybean market size outlook from 2021 to 2032 and the key factors shaping the market along with key strategies adopted by leading companies.

Canada Roasted Soybean Market - Affordability, Retail Concentration and Supply-Chain Resilience Shape Market Growth

Over the past two years, Canadian companies have been focusing on value, supply-chain resilience and manufacturing efficiency to overcome trade and cost pressures. Retail demand also remained firm, with food and beverage retail sales increasing 4.4% year-on-year in December 2025, led by packaged dry foods, fresh meat and poultry, and snacks, according to Statistics Canada. The report identifies competitive pricing and product value, retailer access, diversified sourcing, productivity, brand positioning,

and portfolio innovation as key success factors across the Canadian Roasted Soybean value chain.

Mexico Roasted Soybean Market- Rising Consumption, Manufacturing Expansion and Export Integration Drive Market Development

Mexico's Roasted Soybean market is supported by a large domestic consumer base, established manufacturing capabilities, and strong export integration, while pricing remains an important consideration for consumers and manufacturers. The INEGI reported that the consumer prices for food, beverages and tobacco increased 5.13% year-on-year in May 2026, compared with 3.94% for overall consumer prices, keeping affordability and price management central to category performance. Leading companies are focusing on domestic manufacturing scale, ingredient availability, export competitiveness, product differentiation, efficient sourcing and supply-chain execution to gain profit margins.

Germany Roasted Soybean Market- Private-Label Strength, Price Sensitivity and Manufacturing Efficiency Shape Competition

Value-for-money, private-label competitiveness, efficient sourcing, and cost control are central to market performance and continue to shape the market outlook. German food prices remained structurally above their pre-inflation baseline: the food and non-alcoholic beverages CPI reached 136.2 in 2025 (2020=100), compared with 121.9 for the overall CPI, although annual food inflation moderated to 2.0% in 2025. The market is also being influenced by Germany's policy push toward healthier eating and greater development of alternative protein products, creating additional opportunities for reformulation and product innovation.

France Roasted Soybean Market- Premium Food Culture, Retail Transformation and Selective Consumer Spending Drive Demand

France's Roasted Soybean market is being shaped by moderating food inflation, cautious household consumption and a shift in retail demand toward value and specialized formats. Household final consumption expenditure increased only 0.4% in volume in 2025, while household purchasing power declined 0.4%, keeping affordability and price-value positioning important despite the easing of inflation. Roasted Soybean companies operating in France are balancing value-oriented pricing with quality and differentiation, strengthening supermarket and alternative-format distribution, managing procurement and supply-chain costs, and responding to increasingly selective

household spending.

UK Roasted Soybean Market- Import Dependence, Retail Concentration and Product Portfolio Expansion Influence Market Growth

The UK Roasted Soybean market is strongly influenced by import dependence, household affordability, and retail concentration. Consumer expenditure on food and alcoholic drinks reached ?303.3 billion in real terms in 2025, up 1.1%, with spending on food and drink eaten outside the home increasing 2.3% to ?137.7 billion, while household food expenditure was broadly flat. The structure of the industry also favors companies able to operate efficiently at scale: approximately 98.8% of UK food and drink manufacturing businesses are SMEs, creating a large and fragmented supplier base alongside major manufacturers and retailers. Over the forecast period, competitive pricing, procurement efficiency, product differentiation, retailer and foodservice relationships, import management and the ability to respond remain key success factors.

Spain Roasted Soybean Market- Household Consumption, Tourism and Export-Oriented Manufacturing Support Demand

Spain's Roasted Soybean market is supported by strong household food expenditure, a large tourism-driven consumption base and a highly export-oriented food industry, although consumers remain sensitive to price increases. Tourism provides an additional demand channel: international tourists spent €11.7 billion in Spain in April 2026 alone, up 7.4% year-on-year, including €1.99 billion on food and drinks, up 6.8%. Spain's food industry also reached a record level of exports in 2025, reinforcing its importance as an export manufacturing base and exposing producers to international trade conditions and supply-chain developments.

Italy Roasted Soybean Market- Product Quality, Heritage and Export Competitiveness Remain Key Market Drivers

Italy's consumption structure favors companies capable of maintaining value across differentiated price points: household consumption expenditure averaged €2,738 per month in 2023, up 4.3% from 2022, although the increase reflected both higher spending and price effects. Italy's large manufacturing and export base supports demand for products with strong quality, provenance, and differentiation, particularly where Italian origin provides a competitive advantage. Companies that can combine Italy's established food-manufacturing capabilities with tighter cost control and

differentiated products are better positioned to navigate slower domestic consumption and renewed price pressure.

China Roasted Soybean Market- Digital Commerce, Brand Trust and Selective Consumer Spending Reshape Demand

China's Roasted Soybean markets are being shaped by large-scale domestic consumption, rapid online retail expansion, increasingly selective spending and a widening performance gap between categories. Total retail sales of consumer goods reached RMB 50.1 trillion in 2025, up 3.7%, significantly outperforming beverages at 1.0%. Online retail is particularly important: physical-goods online sales reached RMB 13.1 trillion, representing 26.1% of total consumer-goods retail sales, while online sales of food increased 14.5% according to the National Bureau of Statistics of China. Established brands retain an advantage where consumers prioritize familiarity and brand authority, while the rapid expansion of online food sales creates opportunities for digitally native brands and manufacturers capable of using data, AI, and platform ecosystems.

India Roasted Soybean Market- Rising Consumption, Increasing Investment and Expanding Distribution Create Growth Opportunities

India's Roasted Soybean market is being supported by rising household consumption, a large and increasingly diversified consumer base, expansion of food processing and continued investment in formal food manufacturing. India's rural monthly per-capita consumption expenditure reached ₹4,122 in 2023–24, up from ₹3,773 in 2022–23, while urban MPCE increased to ₹6,996, highlighting the continued expansion of household purchasing capacity across both rural and urban markets. The supply side is also becoming more organized and processing-intensive. Digital commerce and AI-enabled consumer engagement are also becoming increasingly relevant, particularly as Indian consumers adopt digital tools across product discovery and purchasing.

Japan Roasted Soybean Market- Aging Consumers, Household Price Sensitivity and Digital Purchasing Reshape the Market

Japan's Roasted Soybean markets are being shaped by high food expenditure, renewed price pressure and increasingly cautious real household consumption, alongside a structurally mature consumer base. Price pressure has also remained visible in 2026, with Japan's headline CPI increasing 1.5% year-on-year in May 2026, while core inflation excluding fresh food increased 1.4%. Meanwhile, online purchasing

remains an important route to consumers: 55.3% of two-or-more-person households used online shopping in May 2026, with food contributing materially to the increase in online-shopping expenditure. Companies also need to manage smaller household sizes and differing consumption patterns by age, while maintaining strong product differentiation in a mature market where incremental volume growth is more difficult to achieve.

Brazil Roasted Soybean Market- Strong Domestic Consumption and Export-Oriented Manufacturing Drive Growth

Brazil's Roasted Soybean market is supported by a large domestic consumption base, a highly integrated agricultural and food-processing sector, and exceptional export competitiveness, while renewed food-price pressure is keeping affordability important. The country's food and beverage industry generated R\$1.388 trillion in revenue in 2025, equivalent to 10.9% of national GDP, with domestic sales reaching R\$1.02 trillion; retail accounted for R\$732 billion and foodservice R\$287.9 billion. Real industry sales increased 2.2%, while companies invested R\$41.3 billion, up 6.8%, including R\$26.7 billion in innovation, plant modernization and new technologies.

Middle East Africa Roasted Soybean Market- Import Dependence and Value-Added Products Gaining Steady Demand Growth

The Middle East Roasted Soybean markets are being shaped by high dependence on food imports, food-security investment, urbanization, tourism, premium retail and increasingly selective consumer spending, with conditions differing substantially between Gulf markets and the wider region. The GCC recorded overall inflation of only 1.8% in 2025, while food and beverage prices increased 1.2%, indicating relatively contained consumer-price pressure compared with many global markets. Across the region, this combination of import exposure and localization is increasing the importance of supplier diversification, local production, inventory management, and efficient logistics, while strong tourism, hospitality, and modern retail ecosystems are supporting demand for differentiated, convenience-oriented, and premium products.

Roasted Soybean Competitive Landscape

The Roasted Soybean competitive landscape is becoming more fragmented as established multinational brands compete simultaneously with private-label products, regional manufacturers, digitally native brands and category-focused disruptors. Competitive advantage is increasingly determined by the ability to balance price,

product quality, innovation, distribution reach and speed of response rather than by brand scale alone. The report provides detailed analysis of leading companies including business profile, SWOT analysis, products and services, and financial profiles of Archer Daniels Midland Company, Cargill, Incorporated, Bunge Global SA, CHS Inc., The Scoular Company, SunOpta Inc., Devansoy Inc., Zeeland Farm Services, Inc., Soya UK Ltd, Laura Soybeans.

Roasted Soybean Market Segmentation

By Nature

Conventional

Organic

By Form

Whole

Splits

Flour

By Flavor Profile

Plain

Salted

Flavored

By Application

Food and Beverage

Bakery and Confectionery

Snacks and Convenience Foods

Plant-Based Dairy and Beverages

Animal Feed

Industrial Use

By Distribution Channel

Business-to-Business

Supermarkets and Hypermarkets

Specialty and Health Stores

Convenience Stores

Online Retail

Geographical Coverage

North America (US, Canada, Mexico)

Europe (Germany, UK, Spain, France, Italy, Russia, Rest of Europe)

Asia Pacific (China, India, Japan, South Korea, Southeast Asia, Rest of APAC)

Latin America (Brazil, Argentina, Rest of South and Central America)

Middle East and Africa (Saudi Arabia, UAE, MENA, South Africa, Sub-Saharan Africa)

Leading Companies in Roasted Soybean Industry

Archer Daniels Midland Company

Cargill, Incorporated

Bunge Global SA

CHS Inc.

The Scoular Company

SunOpta Inc.

Devansoy Inc.

Zeeland Farm Services, Inc.

Soya UK Ltd

Laura Soybeans

Frequently Asked Questions

1. What is the current size of the Roasted Soybean market?

The Roasted Soybean market is estimated at US\$ in 2026, based on the report's market sizing methodology. Demand is supported by new product launches, while competition from local labels is influencing near-term market performance. The market is expected to reach US\$ by 2032, reflecting the investment expansion of leading companies.

2. How fast is the Roasted Soybean market expected to grow through the forecast period?

The Roasted Soybean market is projected to expand at a 5.09% CAGR between 2026 and 2032, with growth concentrated in Asia Pacific.

3. Which segment currently accounts for the largest share of the Roasted Soybean market?

The report analyzes the report across By Nature (Conventional, Organic), By Form (Whole, Splits, Flour), By Flavor Profile (Plain, Salted, Flavored), By Application (Food and Beverage, Bakery and Confectionery, Snacks and Convenience Foods, Plant-

Based Dairy and Beverages, Animal Feed, Industrial Use), By Distribution Channel (Business-to-Business, Supermarkets and Hypermarkets, Specialty and Health Stores, Convenience Stores, Online Retail).

4. Which regions are generating the largest demand for Roasted Soybean products?

Differences in consumer preferences, pricing, regulation and distribution infrastructure continue to create significant variations in market performance across regions. Asia Pacific is the fastest growing market driven by China, India, Southeast Asia, and other emerging markets.

5. Which companies are leading the Roasted Soybean market?

The Roasted Soybean market includes major participants such as Archer Daniels Midland Company, Cargill, Incorporated, Bunge Global SA, CHS Inc., The Scoular Company, SunOpta Inc., Devansoy Inc., Zeeland Farm Services, Inc., Soya UK Ltd, Laura Soybeans. Leading companies compete through product portfolio, distribution, technology, while recent competitive activity includes M&A, product launches, capacity expansion, and geographic expansion. Market leadership varies significantly by product category and geography.

Contents

CHAPTER 1- EXECUTIVE SUMMARY

- 1.1. Market Snapshot: Market Size, CAGR, and Growth Outlook to 2032
- 1.2. Key Industry Highlights, 2026
- 1.3. Premium Market Insights
 - 1.3.1. Potential Roasted Soybean Market Types and Applications
 - 1.3.2. Fastest Growing Countries Over the forecast period
- 1.4. Market Scope and Segmentation
 - 1.4.1. Key Market Segments
 - 1.4.2. Key Countries and Regions
 - 1.4.3. Top Companies in the Roasted Soybean Industry
- 1.5. Macroeconomic and Demographic Outlook
 - 1.5.1. GDP Outlook by Top 20 Countries, 2010-2030
 - 1.5.2. Population Forecast by Country, 2010-2030
 - 1.5.3. Inflation Trends in Leading Countries
- 1.6. Impact of Trade Policies, Regulations, and Sustainability
 - 1.6.1. Trade tariffs and localization requirements
 - 1.6.2. ESG and sustainability pressures
 - 1.6.3. Compliance-driven structural changes in the value chain

CHAPTER 2- RESEARCH METHODOLOGY

- 2.1. Report Coverage
- 2.2. Secondary Research
- 2.3. Primary Research
- 2.4. Data Triangulation
- 2.5. Market Modeling and Forecasting

CHAPTER 3- GLOBAL ROASTED SOYBEAN MARKET TRENDS, GROWTH DRIVERS, CHALLENGES, AND OPPORTUNITIES THROUGH 2032

- 3.1. An Introduction to Global Roasted Soybean Markets in 2026
- 3.2. Global Historic and Forecast Roasted Soybean Market Size Outlook, USD Million, 2021-2032
- 3.3. Annual Market Size Growth Rate (Y-o-Y), %, 2021-2032
- 3.4. Market Dynamics
 - 3.4.1. Key Roasted Soybean Market Driving Forces and Their Impact on Market

Outlook

- 3.4.2. Short and Long-Term Trends and Insights Shaping the Future
- 3.4.3. Potential Roasted Soybean Market Opportunities for Industry Stakeholders
- 3.4.4. Potential Challenges across Roasted Soybean Value Chain

CHAPTER 4- ROASTED SOYBEAN MARKET COMPETITIVE LANDSCAPE, STRATEGIC ANALYSIS, AND VALUE CHAIN ASSESSMENT

- 4.1. Porter's Five Forces Analysis
 - 4.1.1. Bargaining Power of Buyers
 - 4.1.2. Bargaining Power of Suppliers
 - 4.1.3. Threat of Substitutes
 - 4.1.4. Threat of New Entrants
 - 4.1.5. Intensity of Competitive Rivalry
 - 4.1.6. Market Attractiveness Analysis by Segment
 - 4.1.7. Market Attractiveness Analysis by Country
- 4.2. Competitive Landscape
 - 4.2.1 Product Analysis of Leading Roasted Soybean Companies
 - 4.2.2 Recent Strategic Developments
 - 4.2.3 Mergers, Acquisitions, and Partnerships
 - 4.2.4 Key Success Factors
- 4.3. Value Chain Analysis
 - 4.3.1. Key Value Chain Segments
 - 4.3.2. Dominant players by value-chain stage
- 4.4. SWOT Analysis
 - 4.4.1. Key Strengths and Opportunities
 - 4.4.2. Major Weaknesses and Threats
- 4.5 Technology Roadmap

CHAPTER 5- ROASTED SOYBEAN MARKET OUTLOOK BY SEGMENTS

- 5.1. Market Size Outlook by Type, USD Million, 2021- 2025 and 2026-2032
- 5.2. Market Size Outlook by Application, USD Million, 2021- 2025 and 2026-2032
- 5.3. Market Size Outlook by Country, USD Million, 2021- 2025 and 2026-2032
- By Nature
 - Conventional
 - Organic
- By Form
 - Whole

Splits
Flour
By Flavor Profile
Plain
Salted
Flavored
By Application
Food and Beverage
Bakery and Confectionery
Snacks and Convenience Foods
Plant-Based Dairy and Beverages
Animal Feed
Industrial Use
By Distribution Channel
Business-to-Business
Supermarkets and Hypermarkets
Specialty and Health Stores
Convenience Stores
Online Retail

CHAPTER 6- SCENARIO ANALYSIS AND OUTLOOK

6.1. Base Case Scenario
 6.1.1. Definitions and Insights
 6.1.2. Market Size Outlook to 2032
6.2. Low Growth Case Scenario
 6.2.1. Definitions and Insights
 6.2.2. Market Size Outlook to 2032
6.3. High Growth Case Scenario
 6.3.1. Definitions and Insights
 6.3.2. Market Size Outlook to 2032

CHAPTER 7- NORTH AMERICA ROASTED SOYBEAN MARKET SIZE ANALYSIS AND OUTLOOK

7.1. North America Roasted Soybean Market Overview
7.2. Leading Companies Operating in North America
7.3. Key Industry Statistics, 2026
7.4. North America Roasted Soybean Market Trends and Growth Opportunities to 2032

- 7.5. North America Roasted Soybean Market Size Outlook by Type
- 7.6. North America Roasted Soybean Market Size Outlook by Application
- 7.7. North America Roasted Soybean Market Size Outlook by Country
- 7.8. United States
 - 7.8.1. Key Statistics
 - 7.8.2. The US Roasted Soybean Market Size Outlook, 2021- 2032
 - 7.8.3. Key Market Drivers and Industry Developments in the US Roasted Soybean Companies
- 7.9. Canada
 - 7.9.1. Key Statistics
 - 7.9.2. Canada Roasted Soybean Market Size Outlook, 2021- 2032
 - 7.9.3. Key Market Drivers and Industry Developments in Canada Roasted Soybean Companies
- 7.10. Mexico
 - 7.10.1. Key Statistics
 - 7.10.2. Mexico Roasted Soybean Market Size Outlook, 2021- 2032
 - 7.10.3. Key Market Drivers and Industry Developments in Mexico Roasted Soybean Companies

CHAPTER 8- EUROPE ROASTED SOYBEAN MARKET SIZE ANALYSIS AND OUTLOOK

- 8.1. Europe Roasted Soybean Market Overview
- 8.2. Leading Companies Operating in Europe
- 8.3. Key Industry Statistics, 2026
- 8.4. Europe Roasted Soybean Market Trends and Growth Opportunities to
- 8.5. Europe Roasted Soybean Market Size Outlook by Type
- 8.6. Europe Roasted Soybean Market Size Outlook by Application
- 8.7. Europe Roasted Soybean Market Size Outlook by Country
- 8.8. Germany
 - 8.8.1. Key Statistics
 - 8.8.2. Germany Roasted Soybean Market Size Outlook, 2021- 2032
 - 8.8.3. Key Market Drivers and Industry Developments in Germany Roasted Soybean Companies
- 8.9. France
 - 8.9.1. Key Statistics
 - 8.9.2. France Roasted Soybean Market Size Outlook, 2021- 2032
 - 8.9.3. Key Market Drivers and Industry Developments in France Roasted Soybean Companies

8.10. United Kingdom

8.10.1. Key Statistics

8.10.2. United Kingdom Roasted Soybean Market Size Outlook, 2021- 2032

8.10.3. Key Market Drivers and Industry Developments in the UK Roasted Soybean Companies

8.11. Spain

8.11.1. Key Statistics

8.11.2. Spain Roasted Soybean Market Size Outlook, 2021- 2032

8.11.3. Key Market Drivers and Industry Developments in Spain Roasted Soybean Companies

8.12. Italy

8.12.1. Key Statistics

8.12.2. Italy Roasted Soybean Market Size Outlook, 2021- 2032

8.12.3. Key Market Drivers and Industry Developments in Italy Roasted Soybean Companies

8.13. Rest of Europe

8.13.1. Key Statistics

8.13.2. Rest of Europe Roasted Soybean Market Size Outlook, 2021- 2032

8.13.3. Key Market Drivers and Industry Developments in Rest of Europe Roasted Soybean Companies

CHAPTER 9- ASIA PACIFIC ROASTED SOYBEAN MARKET SIZE ANALYSIS AND OUTLOOK

9.1. Asia Pacific Roasted Soybean Market Overview

9.2. Leading Companies Operating in Asia Pacific

9.3. Key Industry Statistics, 2026

9.4. Asia Pacific Roasted Soybean Market Trends and Growth Opportunities to

9.5. Asia Pacific Roasted Soybean Market Size Outlook by Type

9.6. Asia Pacific Roasted Soybean Market Size Outlook by Application

9.7. Asia Pacific Roasted Soybean Market Size Outlook by Country

9.8. China

9.8.1. Key Statistics

9.8.2. China Roasted Soybean Market Size Outlook, 2021- 2032

9.8.3. Key Market Drivers and Industry Developments in China Roasted Soybean Companies

9.9. Japan

9.9.1. Key Statistics

9.9.2. Japan Roasted Soybean Market Size Outlook, 2021- 2032

9.9.3. Key Market Drivers and Industry Developments in Japan Roasted Soybean Companies

9.10. India

9.10.1. Key Statistics

9.10.2. India Roasted Soybean Market Size Outlook, 2021- 2032

9.10.3. Key Market Drivers and Industry Developments in India Roasted Soybean Companies

9.11. South Korea

9.11.1. Key Statistics

9.11.2. South Korea Roasted Soybean Market Size Outlook, 2021- 2032

9.11.3. Key Market Drivers and Industry Developments in South Korea Roasted Soybean Companies

9.12. Australia

9.12.1. Key Statistics

9.12.2. Australia Roasted Soybean Market Size Outlook, 2021- 2032

9.12.3. Key Market Drivers and Industry Developments in Australia Roasted Soybean Companies

9.13. Southeast Asia

9.13.1. Key Statistics

9.13.2. Southeast Asia Roasted Soybean Market Size Outlook, 2021- 2032

9.13.3. Key Market Drivers and Industry Developments in Southeast Asia Roasted Soybean Companies

CHAPTER 10- SOUTH AND CENTRAL AMERICA ROASTED SOYBEAN MARKET SIZE ANALYSIS AND OUTLOOK

10.1. South and Central America Roasted Soybean Market Overview

10.2. Leading Companies Operating in South and Central America

10.3. Key Industry Statistics, 2026

10.4. South and Central America Roasted Soybean Market Trends and Growth Opportunities to

10.5. South and Central America Roasted Soybean Market Size Outlook by Type

10.6. South and Central America Roasted Soybean Market Size Outlook by Application

10.7. South and Central America Roasted Soybean Market Size Outlook by Country

10.8. Brazil

10.8.1. Key Statistics

10.8.2. Brazil Roasted Soybean Market Size Outlook, 2021- 2032

10.8.3. Key Market Drivers and Industry Developments in Brazil Roasted Soybean Companies

10.9. Argentina

10.9.1. Key Statistics

10.9.2. Argentina Roasted Soybean Market Size Outlook, 2021- 2032

10.9.3. Key Market Drivers and Industry Developments in Argentina Roasted Soybean Companies

10.10. Rest of Latin America

10.10.1. Key Statistics

10.10.2. Rest of Latin America Roasted Soybean Market Size Outlook, 2021- 2032

10.10.3. Key Market Drivers and Industry Developments in Rest of Latin America Roasted Soybean Companies

CHAPTER 11- MIDDLE EAST AND AFRICA ROASTED SOYBEAN MARKET SIZE ANALYSIS AND OUTLOOK

11.1. Middle East and Africa Roasted Soybean Market Overview

11.2. Leading Companies Operating in Middle East and Africa

11.3. Key Industry Statistics, 2026

11.4. Middle East and Africa Roasted Soybean Market Trends and Growth Opportunities to

11.5. Middle East and Africa Roasted Soybean Market Size Outlook by Type

11.6. Middle East and Africa Roasted Soybean Market Size Outlook by Application

11.7. Middle East and Africa Roasted Soybean Market Size Outlook by Country

11.8. Saudi Arabia

11.8.1. Key Statistics

11.8.2. Saudi Arabia Roasted Soybean Market Size Outlook, 2021- 2032

11.8.3. Key Market Drivers and Industry Developments in Saudi Arabia Roasted Soybean Companies

11.9. United Arab Emirates

11.9.1. Key Statistics

11.9.2. The UAE Roasted Soybean Market Size Outlook, 2021- 2032

11.9.3. Key Market Drivers and Industry Developments in the UAE Roasted Soybean Companies

11.10. Africa

11.10.1. Key Statistics

11.10.2. Africa Roasted Soybean Market Size Outlook, 2021- 2032

11.10.3. Key Market Drivers and Industry Developments in Africa Roasted Soybean Companies

CHAPTER 12- COMPANY PROFILES

12.1. Top Companies in Roasted Soybean Industry

Archer Daniels Midland Company

Cargill, Incorporated

Bunge Global SA

CHS Inc.

The Scoular Company

SunOpta Inc.

Devansoy Inc.

Zeeland Farm Services, Inc.

Soya UK Ltd

Laura Soybeans

12.2. Business Description

12.3. SWOT Profiles

12.4. Products and Services

CHAPTER 13- APPENDIX

Glossary of Terms

Research Methodology & Data Sources

Conclusion & Strategic Recommendations

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