

Squeezed Grain Market Size, Share & Growth Report, H2-2026: Industry Outlook By Product Type, By Grain Source, By Application, By Distribution Channel, Companies and Countries to 2032

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Abstracts

The global Squeezed Grain Market is estimated to generate \$163.3 Billion in 2026. Further, between 2026 and 2032, the market size is forecast to grow at a CAGR of 7.2% to reach \$247.8 Billion in 2032. This Squeezed Grain report provides a comprehensive analysis across By Product Type (Rolled and Flaked Grains, Puffed and Extruded Grains, Pressed), By Grain Source (Oats, Barley, Wheat, Corn and Rice, Mixed), By Application (Breakfast Cereals and Muesli, Bakery and Confectionery, Brewing and Distilling, Animal Feed and Pet Food), By Distribution Channel (B2B, Supermarkets and Hypermarkets, Specialty Food Stores, Online Retail), across 5 geographic regions, and 22 countries.

Whole Grain Processing and Consumer Demand for Nutrient-Rich Cereal Products

The global squeezed grain industry comprises cereal grains that are mechanically flattened or rolled through compression processing to improve cooking performance, digestibility and application versatility while preserving much of the grain's nutritional profile. Squeezed grains are widely used in breakfast cereals, porridges, bakery products, snack bars, granola, dairy applications and functional food formulations. Consumer demand is being driven by increasing preference for minimally processed whole grains, high-fiber diets and convenient meal solutions that support digestive wellness and sustained energy release. Food manufacturers are incorporating squeezed oats, barley, wheat, rye and multigrain blends into clean-label formulations that align with healthy eating trends. Sustainability, ingredient traceability and whole-

grain nutrition claims continue to influence purchasing decisions, encouraging processors to optimize grain handling while maintaining product integrity and consistent processing quality.

Grain Processing Innovation and Manufacturing Expansion Strategies

Manufacturers are responding through investments in grain processing technology, specialty ingredient development and regional production capabilities. Ingredion announced a strategic partnership with Sanstar Limited to expand specialty food ingredient manufacturing in India, combining advanced formulation expertise with local grain processing capabilities to strengthen its food ingredient platform. Ingredion also announced its recommended acquisition of Tate & Lyle, expanding its global specialty ingredient portfolio across texturants, fortification and multi-ingredient systems that support cereal and grain-based food applications. Across the industry, processors are investing in precision rolling equipment, automated cleaning systems, digital quality monitoring and energy-efficient grain conditioning technologies to improve product consistency, nutritional retention and manufacturing efficiency while supporting premium whole-grain food production.

Manufacturer-Led Trends in Whole Grain Specialization and Sustainable Processing

Manufacturer activity indicates a growing emphasis on value-added grain ingredients, clean-label processing and sustainable cereal manufacturing. Companies are increasingly adopting digital process control, automated milling and precision rolling technologies that improve product uniformity while reducing waste and energy consumption. Specialty whole-grain blends, organic grain sourcing and identity-preserved supply chains are becoming increasingly important as food manufacturers seek differentiated cereal ingredients with verified provenance. Ingredient suppliers are also expanding collaborative product development, enabling bakery, breakfast cereal and snack manufacturers to formulate products with improved texture, nutrition and processing performance. Investments in sustainable sourcing, circular grain utilization and multifunctional cereal ingredients demonstrate that competitive differentiation is increasingly driven by processing expertise, formulation support and premium grain ingredient innovation rather than commodity grain production.

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 Squeezed Grain 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 Squeezed Grain Industry Value Chain

Squeezed Grain 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.

Squeezed Grain Pricing analysis- How Input Costs, Competition and Positioning Influence Squeezed Grain 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 Squeezed Grain Industry

The chapter in the Squeezed Grain 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 Squeezed Grain Industry

The report identifies the critical success factors that fuel growth in the Squeezed Grain market, in addition to market trends and company capabilities. The Squeezed Grain

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 Squeezed Grain 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 Product Type (Rolled and Flaked Grains, Puffed and Extruded Grains, Pressed), By Grain Source (Oats, Barley, Wheat, Corn and Rice, Mixed), By Application (Breakfast Cereals and Muesli, Bakery and Confectionery, Brewing and Distilling, Animal Feed and Pet Food), By Distribution Channel (B2B, Supermarkets and Hypermarkets, Specialty Food Stores, Online Retail).

US Squeezed Grain Market - Strong Consumer Spending, Private-Label Expansion and Premium Product Demand

The US Squeezed Grain 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 Squeezed Grain market size outlook from 2021 to 2032 and the key factors shaping the market along with key strategies adopted by leading companies.

Canada Squeezed Grain 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 Squeezed Grain value chain.

Mexico Squeezed Grain Market- Rising Consumption, Manufacturing Expansion and Export Integration Drive Market Development

Mexico's Squeezed Grain 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 Squeezed Grain 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 Squeezed Grain Market- Premium Food Culture, Retail Transformation and Selective Consumer Spending Drive Demand

France's Squeezed Grain 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. Squeezed Grain 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 Squeezed Grain Market- Import Dependence, Retail Concentration and

Product Portfolio Expansion Influence Market Growth

The UK Squeezed Grain 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 Squeezed Grain Market- Household Consumption, Tourism and Export-Oriented Manufacturing Support Demand

Spain's Squeezed Grain 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 Squeezed Grain 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 Squeezed Grain Market- Digital Commerce, Brand Trust and Selective Consumer Spending Reshape Demand

China's Squeezed Grain 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 Squeezed Grain Market- Rising Consumption, Increasing Investment and Expanding Distribution Create Growth Opportunities

India's Squeezed Grain 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 Squeezed Grain Market- Aging Consumers, Household Price Sensitivity and Digital Purchasing Reshape the Market

Japan's Squeezed Grain 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 Squeezed Grain Market- Strong Domestic Consumption and Export-Oriented Manufacturing Drive Growth

Brazil's Squeezed Grain 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 Squeezed Grain Market- Import Dependence and Value-Added Products Gaining Steady Demand Growth

The Middle East Squeezed Grain 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.

Squeezed Grain Competitive Landscape

The Squeezed Grain 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, PepsiCo, Inc.,

General Mills, Inc., Associated British Foods plc, Post Holdings, Inc., GrainCorp Limited, Morning Foods Ltd., Bob's Red Mill Natural Foods, Inc..

Squeezed Grain Market Segmentation

By Product Type

Rolled and Flaked Grains

Puffed and Extruded Grains

Pressed

By Grain Source

Oats

Barley

Wheat

Corn and Rice

Mixed

By Application

Breakfast Cereals and Muesli

Bakery and Confectionery

Brewing and Distilling

Animal Feed and Pet Food

By Distribution Channel

B2B

Supermarkets and Hypermarkets

Specialty Food 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 Squeezed Grain Industry

Archer Daniels Midland Company

Cargill, Incorporated

Bunge Global SA

PepsiCo, Inc.

General Mills, Inc.

Associated British Foods plc

Post Holdings, Inc.

GrainCorp Limited

Morning Foods Ltd.

Bob's Red Mill Natural Foods, Inc.

Frequently Asked Questions

1. What is the current size of the Squeezed Grain market?

The Squeezed Grain market is estimated at US\$163.3 Billion 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\$247.8 Billion by 2032, reflecting the investment expansion of leading companies.

2. How fast is the Squeezed Grain market expected to grow through the forecast period?

The Squeezed Grain market is projected to expand at a 7.2% CAGR between 2026 and 2032, with growth concentrated in Asia Pacific.

3. Which segment currently accounts for the largest share of the Squeezed Grain market?

The report analyzes the report across By Product Type (Rolled and Flaked Grains, Puffed and Extruded Grains, Pressed), By Grain Source (Oats, Barley, Wheat, Corn and Rice, Mixed), By Application (Breakfast Cereals and Muesli, Bakery and Confectionery, Brewing and Distilling, Animal Feed and Pet Food), By Distribution Channel (B2B, Supermarkets and Hypermarkets, Specialty Food Stores, Online Retail).

4. Which regions are generating the largest demand for Squeezed Grain 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 Squeezed Grain market?

The Squeezed Grain market includes major participants such as Archer Daniels Midland Company, Cargill, Incorporated, Bunge Global SA, PepsiCo, Inc., General Mills, Inc., Associated British Foods plc, Post Holdings, Inc., GrainCorp Limited, Morning Foods Ltd., Bob's Red Mill Natural Foods, Inc.. 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 Squeezed Grain 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 Squeezed Grain 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 SQUEEZED GRAIN MARKET TRENDS, GROWTH DRIVERS, CHALLENGES, AND OPPORTUNITIES THROUGH 2032

- 3.1. An Introduction to Global Squeezed Grain Markets in 2026
- 3.2. Global Historic and Forecast Squeezed Grain 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 Squeezed Grain 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 Squeezed Grain Market Opportunities for Industry Stakeholders
- 3.4.4. Potential Challenges across Squeezed Grain Value Chain

CHAPTER 4- SQUEEZED GRAIN 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 Squeezed Grain 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- SQUEEZED GRAIN 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 Product Type
 - Rolled and Flaked Grains
 - Puffed and Extruded Grains
 - Pressed
- By Grain Source
 - Oats

Barley
Wheat
Corn and Rice
Mixed
By Application
Breakfast Cereals and Muesli
Bakery and Confectionery
Brewing and Distilling
Animal Feed and Pet Food
By Distribution Channel
B2B
Supermarkets and Hypermarkets
Specialty Food 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 SQUEEZED GRAIN MARKET SIZE ANALYSIS AND OUTLOOK

- 7.1. North America Squeezed Grain Market Overview
- 7.2. Leading Companies Operating in North America
- 7.3. Key Industry Statistics, 2026
- 7.4. North America Squeezed Grain Market Trends and Growth Opportunities to 2032
- 7.5. North America Squeezed Grain Market Size Outlook by Type
- 7.6. North America Squeezed Grain Market Size Outlook by Application
- 7.7. North America Squeezed Grain Market Size Outlook by Country
- 7.8. United States
 - 7.8.1. Key Statistics

- 7.8.2. The US Squeezed Grain Market Size Outlook, 2021- 2032
- 7.8.3. Key Market Drivers and Industry Developments in the US Squeezed Grain Companies
- 7.9. Canada
 - 7.9.1. Key Statistics
 - 7.9.2. Canada Squeezed Grain Market Size Outlook, 2021- 2032
 - 7.9.3. Key Market Drivers and Industry Developments in Canada Squeezed Grain Companies
- 7.10. Mexico
 - 7.10.1. Key Statistics
 - 7.10.2. Mexico Squeezed Grain Market Size Outlook, 2021- 2032
 - 7.10.3. Key Market Drivers and Industry Developments in Mexico Squeezed Grain Companies

CHAPTER 8- EUROPE SQUEEZED GRAIN MARKET SIZE ANALYSIS AND OUTLOOK

- 8.1. Europe Squeezed Grain Market Overview
- 8.2. Leading Companies Operating in Europe
- 8.3. Key Industry Statistics, 2026
- 8.4. Europe Squeezed Grain Market Trends and Growth Opportunities to
- 8.5. Europe Squeezed Grain Market Size Outlook by Type
- 8.6. Europe Squeezed Grain Market Size Outlook by Application
- 8.7. Europe Squeezed Grain Market Size Outlook by Country
- 8.8. Germany
 - 8.8.1. Key Statistics
 - 8.8.2. Germany Squeezed Grain Market Size Outlook, 2021- 2032
 - 8.8.3. Key Market Drivers and Industry Developments in Germany Squeezed Grain Companies
- 8.9. France
 - 8.9.1. Key Statistics
 - 8.9.2. France Squeezed Grain Market Size Outlook, 2021- 2032
 - 8.9.3. Key Market Drivers and Industry Developments in France Squeezed Grain Companies
- 8.10. United Kingdom
 - 8.10.1. Key Statistics
 - 8.10.2. United Kingdom Squeezed Grain Market Size Outlook, 2021- 2032
 - 8.10.3. Key Market Drivers and Industry Developments in the UK Squeezed Grain Companies

8.11. Spain

8.11.1. Key Statistics

8.11.2. Spain Squeezed Grain Market Size Outlook, 2021- 2032

8.11.3. Key Market Drivers and Industry Developments in Spain Squeezed Grain Companies

8.12. Italy

8.12.1. Key Statistics

8.12.2. Italy Squeezed Grain Market Size Outlook, 2021- 2032

8.12.3. Key Market Drivers and Industry Developments in Italy Squeezed Grain Companies

8.13. Rest of Europe

8.13.1. Key Statistics

8.13.2. Rest of Europe Squeezed Grain Market Size Outlook, 2021- 2032

8.13.3. Key Market Drivers and Industry Developments in Rest of Europe Squeezed Grain Companies

CHAPTER 9- ASIA PACIFIC SQUEEZED GRAIN MARKET SIZE ANALYSIS AND OUTLOOK

9.1. Asia Pacific Squeezed Grain Market Overview

9.2. Leading Companies Operating in Asia Pacific

9.3. Key Industry Statistics, 2026

9.4. Asia Pacific Squeezed Grain Market Trends and Growth Opportunities to

9.5. Asia Pacific Squeezed Grain Market Size Outlook by Type

9.6. Asia Pacific Squeezed Grain Market Size Outlook by Application

9.7. Asia Pacific Squeezed Grain Market Size Outlook by Country

9.8. China

9.8.1. Key Statistics

9.8.2. China Squeezed Grain Market Size Outlook, 2021- 2032

9.8.3. Key Market Drivers and Industry Developments in China Squeezed Grain Companies

9.9. Japan

9.9.1. Key Statistics

9.9.2. Japan Squeezed Grain Market Size Outlook, 2021- 2032

9.9.3. Key Market Drivers and Industry Developments in Japan Squeezed Grain Companies

9.10. India

9.10.1. Key Statistics

9.10.2. India Squeezed Grain Market Size Outlook, 2021- 2032

9.10.3. Key Market Drivers and Industry Developments in India Squeezed Grain Companies

9.11. South Korea

9.11.1. Key Statistics

9.11.2. South Korea Squeezed Grain Market Size Outlook, 2021- 2032

9.11.3. Key Market Drivers and Industry Developments in South Korea Squeezed Grain Companies

9.12. Australia

9.12.1. Key Statistics

9.12.2. Australia Squeezed Grain Market Size Outlook, 2021- 2032

9.12.3. Key Market Drivers and Industry Developments in Australia Squeezed Grain Companies

9.13. Southeast Asia

9.13.1. Key Statistics

9.13.2. Southeast Asia Squeezed Grain Market Size Outlook, 2021- 2032

9.13.3. Key Market Drivers and Industry Developments in Southeast Asia Squeezed Grain Companies

CHAPTER 10- SOUTH AND CENTRAL AMERICA SQUEEZED GRAIN MARKET SIZE ANALYSIS AND OUTLOOK

10.1. South and Central America Squeezed Grain Market Overview

10.2. Leading Companies Operating in South and Central America

10.3. Key Industry Statistics, 2026

10.4. South and Central America Squeezed Grain Market Trends and Growth Opportunities to

10.5. South and Central America Squeezed Grain Market Size Outlook by Type

10.6. South and Central America Squeezed Grain Market Size Outlook by Application

10.7. South and Central America Squeezed Grain Market Size Outlook by Country

10.8. Brazil

10.8.1. Key Statistics

10.8.2. Brazil Squeezed Grain Market Size Outlook, 2021- 2032

10.8.3. Key Market Drivers and Industry Developments in Brazil Squeezed Grain Companies

10.9. Argentina

10.9.1. Key Statistics

10.9.2. Argentina Squeezed Grain Market Size Outlook, 2021- 2032

10.9.3. Key Market Drivers and Industry Developments in Argentina Squeezed Grain Companies

10.10. Rest of Latin America

10.10.1. Key Statistics

10.10.2. Rest of Latin America Squeezed Grain Market Size Outlook, 2021- 2032

10.10.3. Key Market Drivers and Industry Developments in Rest of Latin America Squeezed Grain Companies

CHAPTER 11- MIDDLE EAST AND AFRICA SQUEEZED GRAIN MARKET SIZE ANALYSIS AND OUTLOOK

11.1. Middle East and Africa Squeezed Grain Market Overview

11.2. Leading Companies Operating in Middle East and Africa

11.3. Key Industry Statistics, 2026

11.4. Middle East and Africa Squeezed Grain Market Trends and Growth Opportunities to

11.5. Middle East and Africa Squeezed Grain Market Size Outlook by Type

11.6. Middle East and Africa Squeezed Grain Market Size Outlook by Application

11.7. Middle East and Africa Squeezed Grain Market Size Outlook by Country

11.8. Saudi Arabia

11.8.1. Key Statistics

11.8.2. Saudi Arabia Squeezed Grain Market Size Outlook, 2021- 2032

11.8.3. Key Market Drivers and Industry Developments in Saudi Arabia Squeezed Grain Companies

11.9. United Arab Emirates

11.9.1. Key Statistics

11.9.2. The UAE Squeezed Grain Market Size Outlook, 2021- 2032

11.9.3. Key Market Drivers and Industry Developments in the UAE Squeezed Grain Companies

11.10. Africa

11.10.1. Key Statistics

11.10.2. Africa Squeezed Grain Market Size Outlook, 2021- 2032

11.10.3. Key Market Drivers and Industry Developments in Africa Squeezed Grain Companies

CHAPTER 12- COMPANY PROFILES

12.1. Top Companies in Squeezed Grain Industry

Archer Daniels Midland Company

Cargill, Incorporated

Bunge Global SA

PepsiCo, Inc.
General Mills, Inc.
Associated British Foods plc
Post Holdings, Inc.
GrainCorp Limited
Morning Foods Ltd.
Bob's Red Mill Natural Foods, Inc.
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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