Sunflower Meal Market Assessment, By Product Type [Dehulled Sunflower Meal, Non-Dehulled Sunflower Meal], By Livestock [Poultry, Ruminants, Swine, Aquaculture], By Application [Animal Feed, Fertilizer], By Region, Opportunities and Forecast, 2018-2032F

Market Report | 2025-02-19 | 224 pages | Market Xcel - Markets and Data

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Report description:

Global sunflower meal market is projected to witness a CAGR of 6.39% during the forecast period 2025-2032, growing from USD 7.51 billion in 2024 to USD 12.33 billion in 2032. The market is consistent in its growth, as sunflower meal is being increasingly used as a high-protein animal feed ingredient in the diets of livestock. Sunflower meal is a byproduct of sunflower oil extraction and comprises good protein, fiber, and balanced amino-acid profile nutrients, forming cheaper alternatives to soybean meal in animal feed formulations. The demand for sunflower meal is expected to continue growing due to expanded livestock, and the growing concern for sustainability and nutrition in feed. Furthermore, sunflower meal is a non-GMO which is quite appealing for organic and non-GMO feed sectors.

Production fluctuations of sunflower seeds, regionally defined feed requirements, and accessibility to competing protein sources are some of the dominating aspects impacting the market. Europe is the largest consumer and producer of sunflower meal with its strong livestock industry and associated sunflower hectares under cultivation. In the first nine months of the 2023-24 marketing year, Ukraine's sunflower meal exports increased by 23% to 3.8 million tons, the highest in the previous four seasons. Emerging markets such as Asia-Pacific are experiencing a growing demand for sunflower meals due to the rapid animal husbandry and aquaculture activities.

Competition from alternate protein sources, variable nutrient composition of seeds, and transport costs for bulk exports characterize the market challenges. Innovations in feed formulation and extraction processes are anticipated to benefit product quality and market penetration. As sustainability begins to take root in agriculture, the sunflower meal market is poised for growth given its green production and potential as an important component in feed. The increasing global demand for cost-effective, high-protein feeds is expected to further bolster market growth in future.

Expanding Livestock Industry Catalyzes Market Expansion

The expansion of the global meat industry drives the rising demand for sunflower meals as an important constituent of feed. These changes in dietary demands toward rich protein-based products from animals in the form of meat and eggs, as well as the development of people's standard of living, have triggered a change in diets, especially in emerging countries, with increasing populations worldwide. By 2022, the average yearly meat consumption worldwide grew to 44.5 kilos per person, up from 41.4 kilograms in 2012. This desire for meat has led to the adoption of newer livestock production methods in developing nations experiencing a rapid increase in production in modern industrialized husbandry.

The sunflower meal is a relatively low-cost, high-protein animal feed, that meets the demands of livestock industries. This is concentrated in poultry, cattle, and aquaculture feeds, where protein is a necessity for growth, reproduction, and productivity. Ruminants also benefit from fiber constituents present in the meal, thus being good for a wide range of animal categories. As the feed cost forms a significant part of livestock production costs, the use of sunflower meal increases profit margins for farmers and feed manufacturers.

Additionally, the growth in the global aquaculture industry has substantially raised sunflower meal adoption as a plant-based protein alternative in fish feeds. All these trends, combined, secure the future of sunflower meals as integral to meeting the growing demand for animal-based foods.

Nutritional Benefits of Sunflower Meal Influences the Market Growth

The unique properties of sunflower meal nutrition make it an essential raw material in animal feed and further increase its market growth. Based on different extraction methods, sunflower meal is 28-42% protein and has an amino acid profile. Sunflower meal is high in methionine and a good source of cysteine, which meets special requirements for livestock protein in muscle growth, reproduction, and overall health.

Improvements in growth rate, egg production, and immunity have been observed from feeding sunflower meals to poultry. It has great digestibility and palatability, thus suitable for young and mature birds alike. In dairy farming, fiber content is useful for digestion, especially for ruminants hence improving feed efficiency. Sunflower meal substitutes also have great potential in aquaculture by reducing the dependency on expensive fishmeal in feeds without compromising quality.

Moreover, using sunflower meal as a fertilizer source is an alternate way to use this by-product material. The soil with lower levels of N, P, K, and organic matter yields the greatest benefit by applying sunflower meals to soils with this fertility condition.

Dehulled Sunflower Meal Holds a Significant Share in the Market

The largest share of the dehulled sunflower meal section is attributable to its advantages in application across livestock types and higher protein levels. The hull removal leads to a protein concentration of up to 40%, making it ideal for poultry, swine, and aquaculture feed. Thus, this protein-rich profile supports healthy growth, reproduction, and animal productivity, resulting in increasing demands for nutritionally balanced feed. A dehulled meal has low fiber content, thus improving digestibility, especially for non-ruminant animals such as poultry and fish.

The major extension to the usage of dehulled sunflower meals is the cost advantage over other protein sources, notably soybean meals. This is because it has been produced and consumed in regions such as Europe, which has the highest concentration of sunflower cultivation. Other emerging markets, such as Asia-Pacific, have increased their consumption through developments in the livestock and aquaculture industry. Dehulled sunflower meal is complemented by non-dehulled meal meant primarily for ruminants, owing to the fiber it contains. The diversity and higher nutritional value of dehulled sunflower meals ensure their dominance, particularly in commercial feed formulations for high-yield animal production.

Europe Dominates the Global Sunflower Meal Market

Europe produces and consumes the most sunflower meal in the world, which corresponds to the extent of sunflower cultivation and the extent of the livestock industry in the region. According to the estimates by the EU Commission, the area for sunflower cultivation increased 4% to 4.9 million hectares in 2024. Romania records 1.3 million hectares of sunflowers planted, making it the EU-27's most important production region.

Furthermore, favorable climatic conditions combined with a well-established agricultural infrastructure in the region contribute to the region's dominance. The continent is further fortified by the significant presence of sunflower oil processors producing sunflower meals as a byproduct, hence keeping a constant supply to meet the demands of domestic and external markets.

The strength of livestock production in Europe drives consumption of sunflower meals, especially among poultry and dairy

farmers, since high-protein feed is essential for animal health and productivity. In addition, the high degree to which sunflower meal contributes to the sustainability and non-GMO profile of feed solutions is another factor boosting demand in this region. Government regulations supporting sustainable practices and the promotion of plant protein sources also generate growth in the market.

While regions such as Asia-Pacific have been growing rapidly to gain a share, Europe continues to dominate due to its production base, consistent demand, and dedication to sustainable practices in agriculture.

Future Market Scenario (2025 - 2032F)

- The rise in livestock, and aquaculture production in emerging markets, will increase the demand for sunflower meals. The planned adoption of animal husbandry practices and the demand of consumers for protein-rich foods will encourage the adoption of sunflower meals in the future.
- Sustainable agriculture will enhance sunflower meal production to become more eco-friendly and non-GMO. Such a trend would merge with global development towards organic farming as well as sustainable feed solutions, thus positioning Sunflower Meals as a pioneer in eco-conscious markets.
- Innovations in processing techniques and feed formulations will increase the nutritional quality of sunflower meals, further enhancing the digestion for consumption, and giving competition to other protein sources such as soybean meals. This may lead to its acceptance in high-performance livestock feeds and the future expansion of its demand.

Key Players Landscape and Outlook

The sunflower meal market is a competitive playground comprising established feed manufacturers, agricultural cooperatives, and regional oilseed processing plants. Optimization of operational efficiencies and a constant supply of high-quality sunflower meals are the two most apparent objectives of these players to meet the emerging demand in the livestock and aquaculture sectors. Most producers devote their attention to developing advanced extraction techniques to increase the protein content, thus improving its digestibility, mainly to suit specific formulations for poultry, cattle, and fish feeds.

The growth of livestock production, particularly in emerging economies, and the emergence of sustainable and non-GMO feed ingredients have a strong and positive outlook for the market. Major companies will likely take advantage of regional market opportunities through their enhanced distribution networks and collaborative ventures with local feed manufacturers. Similarly, the growing adoption of sunflower meal; the key for aquaculture, and its increasing attractiveness as a low-cost substitute for soybean meals suggest opportunities for future growth.

The sunflower meal market will witness a stir in competition, innovation, and regional diversification among players since competitors strive to capture a larger share of this growing segment.

In April 2023, Cargill, Incorporated invested USD 50 million in Australia to modernize and expand its oilseed crushing facilities in Newcastle, Narrabri, and Footscray. Every year in Australia, Cargill processes more than 680,000 tons of oilseeds including sunflower, canola, cottonseed, and soybeans to provide vegetable oil for products such as margarine, salad dressings, and frying as well as protein meal for animal feed.

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