

Rapeseed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Rapeseed Market Analysis

The rapeseed market, valued at USD 44.7 billion in 2025, is projected to reach USD 55.1 billion by 2030, registering a CAGR of 4.33%. The market growth is primarily attributed to strengthening bio-fuel mandates across Europe and North America, increased incorporation in sustainable aviation fuel production, and the commodity's dual functionality as an oil and protein source. The implementation of Europe's Renewable Energy Directive III has intensified the demand for vegetable-oil feedstock. The United States' renewable diesel capacity, which exceeds 850,000 barrels of oil-equivalent per day in 2024, is projected to expand to 1.3 million barrels by 2035, subsequently impacting global supply dynamics. Market development is further supported by China's advancement in high-yield varieties and India's expansion of crushing capacity, particularly for protein meal production. Supply constraints stemming from climate variability in primary production regions continue to maintain robust price levels. The market structure is transforming strategic vertical integration initiatives by major agribusinesses and the incorporation of regenerative agriculture practices.

Global Rapeseed Market Trends and Insights

Expansion of Bio-fuel Mandates

Bio-fuel policy acceleration is driving significant demand in the rapeseed market. Europe's Renewable Energy Directive III mandates a 14.5% greenhouse-gas intensity reduction in transport fuels by 2030, compelling refiners to increase their low-carbon

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feedstock procurement. In the United States, renewable diesel projects are expanding capacity to 1.3 million barrels of oil-equivalent per day by 2035, resulting in record rapeseed oil imports. The implementation of Indonesia's B35 mandate and Brazil's B15 target further increases the global vegetable-oil deficit, supporting rapeseed prices. European hydrotreated vegetable-oil demand is projected to increase by more than 400,000 metric tons in 2025, with rapeseed oil accounting for nearly half of this volume. The imposition of anti-dumping duties on Chinese biodiesel reinforces rapeseed's importance in meeting renewable-fuel requirements.

Rising Demand for Plant-Based Protein Meal

Rapeseed meal consumption is increasing across livestock, aquaculture, and human-nutrition sectors as an alternative protein source to soybean. The EU-27 consumed 13.75 million metric tons and China 12.54 million metric tons in 2024, demonstrating the growing global adoption of rapeseed. Danish research developments in glucosinolate removal have created a human-grade protein concentrate suitable for food ingredients. Research indicates that rapeseed protein's amino-acid profiles match soybean quality and provide superior benefits for non-ruminant animals. Through fermentation processes, antinutritional factors have been reduced, enabling 25% fishmeal replacement in salmon feed and reducing aquaculture production costs. The pharmaceutical industry's extraction of bioactive peptides from rapeseed meal has created additional revenue opportunities and strengthened market growth.

Climate-Driven Pest and Disease Volatility

An increase of one degree Celsius in winter temperatures reduces UK rapeseed yields by 113 kg per hectare, resulting in USD 21.61 million (GBP 16 million) in annual losses for producers. Higher winter temperatures enable multiple generations of aphids, increasing virus transmission risk and pesticide expenditure, thereby reducing profit margins. Research demonstrates that the combination of elevated CO₂, heat, and ozone reduces omega-3 content by 45% and decreases oil yields by 58% in controlled trials, indicating potential quality deterioration under future climate conditions. The northward migration of pathogens, evidenced by clubroot detection beyond traditional boundaries in Scandinavia, necessitates enhanced biosecurity measures. While producers implement biological controls, resistant varieties, and precision monitoring to maintain yields, these measures increase operational complexity and costs, limiting rapeseed market expansion.

Other drivers and restraints analyzed in the detailed report include:

Favorable Price Spread Versus Other Oilseed Crops / Rapeseed Oil as Feedstock for Sustainable Aviation Fuel / Acreage Competition from Other Oilseed Crops /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The Rapeseed Market Report is Segmented by Geography (North America, Europe, Asia-Pacific, South America, Middle East, and Africa). The Study Includes Production Analysis (Volume), Consumption Analysis (Value and Volume), Export Analysis (Value and Volume), Import Analysis (Value and Volume), and Price Trend Analysis. The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons).

Geography Analysis

Europe maintains a 35.2% share of the global rapeseed market in 2024 despite increasing import requirements due to weather-affected yields. France demonstrates acreage recovery, and Germany reports incremental area expansion, while reduced

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seed counts persist due to insufficient vernalization periods. The United Kingdom recorded a 12% decrease in output year-on-year due to flea beetle infestations, while demand remains consistent for biodiesel and culinary oil production. Ukraine increased export volumes to Europe despite logistical constraints, with Australia providing a supplementary supply, demonstrating Europe's strategic diversification of import sources. The region's hydrotreated vegetable oil production requirements will increase by 400,000 metric tons in 2025, sustaining crusher utilization and market stability.

Asia-Pacific holds the fastest growth rate at 4.8% CAGR through 2030 due to policy support and agronomic improvements. China's implementation of high-yield hybrids across 7 million hectares could increase domestic self-sufficiency by 14.5 percentage points, reducing edible oil import expenses. India's expanding poultry sector, growing at 9% annually, drives increased meal consumption. Australia strengthens its position through record rapeseed plantings and new crushing facilities near Perth, serving both domestic bio-fuel needs and export markets. Japan focuses on specialty oil production, including non-GMO food-service varieties, while South Korea imports rapeseed meal for aquaculture feed, creating diverse regional market opportunities.

North America benefits from supportive policies and agricultural advantages. The United States reached 1 million hectares of rapeseed cultivation in 2024, with North Dakota contributing 830,000 hectares, supported by improved crop insurance and favorable pricing. Canadian processors crushed 5.93 million metric tons in 2024, producing 2.49 million metric tons of oil and 3.47 million metric tons of meal for export to Mexico, Japan, and the United States. New processing facilities in Kansas and Saskatchewan will add 1.5 million metric tons of crushing capacity, strengthening regional supply. South America maintains a limited market presence, with Argentina's production restricted by soybean prevalence, though Brazil's southern regions show potential through winter-rapeseed trials.

List of Companies Covered in this Report:

Market Overview / Market Drivers / Market Restraints / Value/Supply-Chain Analysis / Regulatory Landscape / Technological Outlook / PESTLE Analysis / List of Stakeholders /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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