

## **Soybean Derivatives - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

Soybean Derivatives Market Analysis

The soybean derivatives market size reached USD 275.87 billion in 2025 and is projected to reach USD 343.01 billion by 2030, growing at a CAGR of 4.45%. The market growth reflects adaptation to changing demand patterns, particularly in renewable diesel production, which has altered traditional soy oil distribution. Food, feed, and functional applications continue to expand. The Asia-Pacific region maintains the largest market share, driven by increased livestock production and protein consumption, while the Middle East and Africa region shows the highest growth potential due to expanding poultry production and food security initiatives. Soy meal remains the primary derivative due to consistent livestock demand, while soy protein sales increase with growing plant-based food consumption. Liquid soy formulations are gaining traction among beverage manufacturers seeking nutritious ingredients. While production capacity increases in the United States, Brazil, and Argentina ensure sufficient raw material supply, the market faces challenges from price fluctuations, deforestation regulations, and competition for sustainable feedstock sources.

Global Soybean Derivatives Market Trends and Insights

Rising Demand for Plant-Based Proteins

The growing consumer preference for plant-based foods is increasing the use of soy protein in food and beverage products. The shift is particularly evident in developed markets, where health consciousness and environmental concerns drive consumption

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patterns. Soy protein applications now extend beyond meat alternatives to include functional beverages and meal replacements, utilizing soy's complete amino acid composition. Research shows that nanoparticles combining vitamin E, calcium, and soy protein isolate improve nutrient absorption in beverages. This development benefits liquid soy products as companies create convenient, nutrient-rich options for health-focused consumers. The enhanced bioavailability of nutrients in these formulations addresses consumer demands for more effective nutritional solutions. The FDA's revised guidelines on plant-based milk alternatives strengthen soy's market position, as it remains the only plant-based beverage recognized in the dietary guidelines' dairy category. This regulatory recognition provides manufacturers with additional opportunities to develop innovative soy-based products that meet both nutritional requirements and consumer preferences.

#### Growing Adoption of Soy-Based Ingredients in Animal Feed

The expansion of the livestock sector in developing markets is driving the demand for high-quality protein sources, with soybean meal emerging as a crucial ingredient in animal nutrition due to its comprehensive amino acid composition. In Saudi Arabia, the increasing adoption of compound feed demonstrates this trend, as farmers utilize soybean meal to improve livestock productivity and feed conversion rates and address growing protein requirements in their animal populations. The development of double-fermented soybean meal has significantly reduced anti-nutritional factors while enhancing digestibility and amino acid absorption in broiler chickens, creating new premium product segments in the animal feed market. According to data from the USDA, U.S. soybean meal exports are anticipated to reach 17.3 million short tons in the market year 2024-2025, reflecting increased global demand, particularly in Asia-Pacific markets where intensive livestock production continues to grow, despite strong competition from South American producers. Processing advancements, including fermentation techniques and enzyme treatments, are elevating soybean meal from a basic commodity to a specialized nutrition product, driving sustained demand across various livestock applications.

#### Fluctuating Raw-Material Prices

According to USDA data, the U.S. season-average farm price for soybeans in 2024/25 is forecast at USD 11.20 per bushel, down from USD 12.55 per bushel in MY 2023/24. Soybean meal prices are expected to decrease to USD 330.00 per short ton, and soybean oil prices are projected to decline to USD 0.42 per pound. These substantial price fluctuations have created considerable margin pressure throughout the derivatives value chain, compelling processors to implement more sophisticated and dynamic pricing strategies to maintain profitability. Transportation costs increased substantially due to drought-related delays at the Panama Canal and escalating security issues in the Red Sea route, which forced merchants to seek alternative shipping paths, resulting in higher operational expenses and logistical complexities. In Brazil, the sharp rise in input costs effectively doubled operating expenses, leading producers to significantly reduce their chemical applications. This reduction in agricultural inputs has subsequently impacted crop yield consistency, overall production quality, and potentially long-term soil health, raising concerns about future harvest outcomes and market stability.

Other drivers and restraints analyzed in the detailed report include:

Increasing Demand from the Biodiesel Industry / Easy and Abundant Availability of Raw Materials / Stringent Government Regulations on Genetically Modified Soybeans /

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

#### Segment Analysis

Soy meal accounted for 63.13% of the soybean derivatives market in 2024, driven by its essential role in animal feed production. The growing poultry and aquaculture industries in Asia-Pacific and Middle East, and Africa regions sustain the demand for soy

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meal products. Improved fermentation techniques have enhanced soy meal digestibility, enabling manufacturers to increase prices for broiler feed formulations. The enhanced digestibility has established soy meal as a primary protein source in animal nutrition, particularly in commercial poultry operations where feed efficiency is essential.

The soy protein market is projected to grow at a 6.05% CAGR through 2030, driven by increased production of textured vegetable protein, nutritional bars, and dairy alternatives for flexitarian consumers. Enhanced liquid formulations benefit from both convenience and improved bioavailability through nano-encapsulation technology. The soy oil market is increasingly influenced by renewable diesel demand, with the share of U.S. soybean oil used for biofuel rising from less than 1% in 2001/02 to 46% in 2022/23, according to data from the USDA. While soy milk maintains consistent demand in Asia, new fortified beverage launches in North America and Europe contribute to market growth.

Conventional soybeans hold an 83.15% market share in 2024, while organic variants grow at a 7.75% CAGR. Conventional production benefits from technological advances, including genetically engineered seeds and precision agriculture, with seeding rate optimizations improving yield efficiency and cost competitiveness. Farmers implementing these technologies report increased productivity and reduced input costs per hectare. The organic segment faces challenges, including limited herbicide options and complex pest management requirements.

Organic producers must rely on crop rotation, biological controls, and mechanical weed management strategies to maintain crop health. However, increasing consumer demand for non-GMO products supports its growth despite supply constraints. The premium pricing for organic soybeans often offsets the lower yields and higher production costs. Contract production dominates the organic segment, providing price stability and quality assurance for producers and buyers. These contracts typically include specific production protocols and delivery schedules, ensuring consistent supply chain management.

The Soybean Derivatives Market is Segmented by Type (Soy Oil, Soy Milk, Soy Meal, and More), Nature (Conventional, and Organic), Form (Solid, and Liquid), Application (Food and Beverages, Animal Feed, and More), and Geography (North America, Europe, Asia-Pacific, South America, and Middle East and Africa). The Market Forecasts are Provided in Terms of Value (USD).

#### Geography Analysis

Asia-Pacific accounted for 42.65% of the market revenue in 2024, primarily due to China's extensive feed industry. The region's dominance is further strengthened by its robust agricultural infrastructure and growing livestock population. Regional processors are increasing their capacity in Vietnam, Thailand, and Indonesia to optimize supply chains and enhance crush margins. These expansions aim to meet the rising demand from local markets and reduce dependency on imports. South Asia, with India at the forefront, is experiencing double-digit growth in poultry production, driving up the demand for soybean meal. The growth in India is supported by increasing consumer preference for protein-rich diets and government initiatives promoting agricultural development.

The Middle East and Africa region shows the highest CAGR at 6.82%, supported by investments in the poultry sector. Saudi Arabia increases compound feed usage to enhance broiler weights. In February 2025, Almunajem's Balady Poultry Trading Co. planned to invest USD 304 million in poultry operations expansion in Saudi Arabia. Europe is preparing for the implementation of the Deforestation Regulation in 2025, which will influence sourcing patterns toward zero-deforestation certified suppliers. South American producers increase cultivation area but face challenges from higher interest rates and logistics constraints, limiting their market advantages.

North America's integrated farm-to-fuel supply chain has reshaped domestic soybean distribution. The growing demand for renewable diesel has compelled traders to balance domestic oil requirements with export meal commitments, leading the United States to become a soybean oil importer in 2023. This shift reflects the region's increasing focus on sustainable fuel alternatives

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and environmental regulations. The transformation has created new market dynamics, affecting both domestic production patterns and international trade relationships. Processors are adapting their operations to accommodate these changes while maintaining efficiency in their supply chains.

List of Companies Covered in this Report:

Archer Daniels Midland Company / Bunge Limited / Cargill, Incorporated / Ag Processing Inc. / Louis Dreyfus Company B.V. / CHS Inc. / Wilmar International Limited / Fuji Oil Holdings Inc. / The Scoular Company / The Nisshin Oillio Group Ltd. / Xinrui Group / Devansoy Inc. / Burcon NutraScience Corporation / SLC Agricola / Vicentin SAIC / Viterra Limited / Marubeni Corporation / Amaggi Group / Caramuru Alimentos S.A. / Shandong Saigao Group Corporation /

Additional Benefits:

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

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