Strategic Review

Lecithin Markets: Current and Future Landscape

2025 - 2030

Production, Supply, Demand, Forecasts, Current Challenges and Opportunities

INTRODUCTION

Lecithins are a group of yellow-brown fatty substances that occur naturally in animal and plant tissues (grains, legumes, peanuts, soybeans, wheat germ, and yeast), and in egg yolk. They are made up of phosphoric acid, choline, fatty acids, glycerol, glycolipids, triglycerides and phospholipids. Lecithin, in view of its ability to moisturize, preserve and emulsify, is used as an emulsifier in various sectors in the food industry such as cake mixes, chocolate, etc. It is also widely used in the non-food industry like cosmetics, pharmaceuticals, coatings in the plastic and rubber industry, etc. Since Russia's invasion of Ukraine in 2022 sunflower lecithin production and supply has been negatively impacted, with soy and canola lecithins serving the demand surplus. However, sunflower lecithin supply is recovering—albeit, not back to pre-War levels—and this dynamic is one of the principal driving forces in today's market.

Giract is commencing a comprehensive market assessment of lecithin, aimed to guide decisions on investing in new product launches, develop assets and mergers and acquisitions, and enhance its strategic positioning and competitiveness in the global emulsifier landscape. Giract has conducted several in-depth market research projects in the field of lecithin and fats and oils since 1999. The current project will provide and analyse the most up-to-date information on the dynamic lecithin sector. This study will provide you with production, trade and demand estimates by sector for the individual regions and a global overview of supply.

OBJECTIVES

The core objective of this study is to provide comprehensive understanding of the current lecithin market, and identify opportunities and potential market pitfalls to support strategic decisions. This will be accomplished by the following sub-objectives:

- To Identify production output (kt) by manufacturer, lecithin, and botanical source
- To provide capacity assessment, and capacity utilisation, by lecithin, by manufacturer
- To characterise trade and availability (kt) by lecithin, and botanical source
- To provide current (2025; kt) and forecast demand (2030; kt) by application, lecithin, and botanical source
- To provide a competitive analysis of the different lecithins by type, source, and other competitor ingredients

PRODUCTS

Lecithin: by source (soy, sunflower, canola and egg), and type (Crude, Deoiled/powder, Hydrolysed, Fractionated, Other (complex, purified, ultra-filtered, and combined, etc.)

Lecithins will also be split by grade: food-approved, etc. where applicable. Fractionated and Other lecithins have been included as additional high-value lecithin products

MARKETS

Europe (EU27+UK+CH+NO) and North America (USA+Canada), Middle East, North Africa, ASEAN. Production and supply to be presented globally.

SECTORS

Food: bakery, chocolate, margarine, ice-creams, infant/baby foods, others)

Non-food: nutraceuticals, pet food, speciality animal feed*, fractionated lecithin, further processing, other non-food applications

**Speciality feed comprises aquaculture, piglet milk replacer (PMR) and calf milk replacer (CMR). Commodity animal feed is not covered due to limited use of speciality lecithin*

TIMESCALE

Current demand: 2025; forecast demand: 2030

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