



Global Frozen Avocado Market

Market size, segmentation, competitive landscape and outlook

2021-2031

September 2026

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Indicator	Value
Market size (2025)	USD 1.1 bn
Forecast (2031)	USD 2.1 bn
CAGR (2021-2031)	10.6%
Study period	2021-2031
Largest region	North America · 42.5%
Fastest-growing region	Asia-Pacific · 13.8%
Market concentration	Moderate
Licence	Individual / Company

The global frozen avocado market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a CAGR of XX%. Foodservice demand, year-round menu availability and the conversion of cosmetically imperfect fruit into value-added products are accelerating processor investment. North America accounts for XX% of market value, while Asia-Pacific is the fastest-growing region at XX% CAGR. IQF pieces are gaining share alongside established frozen pulp and guacamole formats as buyers prioritize portion control, labor savings and reduced spoilage.

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Executive summary

The global frozen avocado market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a CAGR of XX%. Foodservice demand, year-round menu availability and the conversion of cosmetically imperfect fruit into value-added products are accelerating processor investment. North America accounts for XX% of market value, while Asia-Pacific is the fastest-growing region at XX% CAGR. IQF pieces are gaining share alongside established frozen pulp and guacamole formats as buyers prioritize portion control, labor savings and reduced spoilage.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global frozen avocado market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Global frozen avocado volume totaled XXX metric tons in 2025 and will rise to XXX metric tons by 2031.
- IQF products represented XX% of 2025 market value, supported by portionability and lower thaw loss.
- North America held XX% of global revenue in 2025, reflecting mature foodservice penetration and extensive Mexican supply integration.
- Foodservice applications accounted for XX% of market value, ahead of food manufacturing at XX% and household retail at XX%.
- FAOSTAT recorded XXX metric tons of global avocado production in 2023, including XXX metric tons from Mexico.
- USDA Foreign Agricultural Service forecast Mexican avocado production at XXX metric tons and exports at XXX metric tons in 2025.
- UN Comtrade data show that the United States imported XXX kilograms of fresh or dried avocados worth USD XXX billion in 2024, underpinning the region's processing base.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Frozen Avocado Market Trends and Growth Drivers

Frozen avocado occupies the intersection of two structural food trends: rising avocado consumption and the transfer of preparation work from kitchens to industrial processors. The value proposition is strongest where fresh fruit creates costly ripeness management, uneven yields and short usable life. IQF formats convert those operational problems into predictable portions and stable inventory.

Supply economics remain tied to the fresh-avocado market. Processors compete for fruit against exporters while also creating value from grades that do not meet whole-fruit cosmetic specifications. Scale, proximity to orchards and the ability to shift sourcing between origins determine whether a supplier can maintain customer pricing and quality through seasonal transitions.

The next phase of competition will be defined by sensory performance and procurement compliance. Improved texture after thawing expands addressable applications, while traceability, water stewardship, residue management and audited labor practices determine access to premium customers.

Growth drivers

Foodservice labor and waste reduction

Frozen avocado eliminates ripeness sorting, peeling, pitting and variable kitchen yield while giving operators a predictable cost per serving. Quick-service restaurants, institutional kitchens and delivery-focused concepts use pre-portioned formats to simplify training and limit spoilage during uneven traffic periods.

Year-round avocado menu availability

Freezing decouples menu planning from the short usable window of ripe fresh fruit and reduces exposure to gaps between producing origins. The benefit is strongest for restaurant chains and manufacturers that require consistent color, dry matter and texture across multiple markets.

IQF technology and product improvement

Advances in rapid freezing, antioxidant systems and oxygen-control packaging are improving thawed texture and color retention. Better sensory performance is opening applications in salads, bowls and garnishes that previously relied almost entirely on fresh avocado.

Avocado adoption in Asian foodservice

Smoothie chains, cafés, sushi operators and Western-style quick-service restaurants are incorporating avocado into beverages, rice bowls, sandwiches and desserts. Frozen formats solve local ripening and supply-chain constraints, making them particularly effective in cities with limited mature-fruit handling infrastructure.

Total-crop utilization

Processors monetize undersized, externally marked and export-rejected fruit that retains suitable flesh quality. This creates an additional outlet for growers, improves packhouse recovery and supports competitive input costs during periods of abundant production.

Retail frozen-fruit convenience

Resealable bags position frozen avocado alongside berries, mango and smoothie blends as a ready-to-use household ingredient. Consumer acceptance is increasing as air fryers, home blending and meal preparation normalize freezer-based produce purchasing.

Restraints

Raw-material price volatility

Weather, alternate-bearing cycles, export demand and phytosanitary disruptions can move avocado prices sharply within a processing season. Processors without multi-origin procurement or indexed customer contracts face margin compression when fresh-market realizations rise.

Cold-chain operating costs

Freezing, frozen storage and refrigerated distribution add energy and handling costs that fresh processors do not carry in the same form. The burden is greatest in emerging markets with expensive electricity, limited cold stores and fragmented last-mile logistics.

Thaw-quality limitations

Cell damage can produce softness, purge and surface browning after thawing, constraining use in applications where intact texture is visible. Product development and disciplined temperature control reduce the problem but increase technical and quality-assurance requirements.

Environmental and sourcing scrutiny

Large buyers are tightening expectations for water management, deforestation controls, labor standards and traceability in avocado-growing regions. Suppliers unable to document orchard-level practices face restricted access to premium retail and multinational foodservice accounts.

Food-safety and border compliance

Processed avocado and guacamole plants must control environmental pathogens, pesticide residues and supplier verification across international supply chains. Detentions, recalls or failed audits can interrupt customer programs and impose substantial remediation costs.

Frozen Avocado Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Foodservice labor and waste reduction	XXX	XXX	XXX
Year-round avocado menu availability	XXX	XXX	XXX
IQF technology and product improvement	XXX	XXX	XXX
Avocado adoption in Asian foodservice	XXX	XXX	XXX
Total-crop utilization	XXX	XXX	XXX
Retail frozen-fruit convenience	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Raw-material price volatility	XXX	XXX	XXX
Cold-chain operating costs	XXX	XXX	XXX
Thaw-quality limitations	XXX	XXX	XXX
Environmental and sourcing scrutiny	XXX	XXX	XXX
Food-safety and border compliance	XXX	XXX	XXX

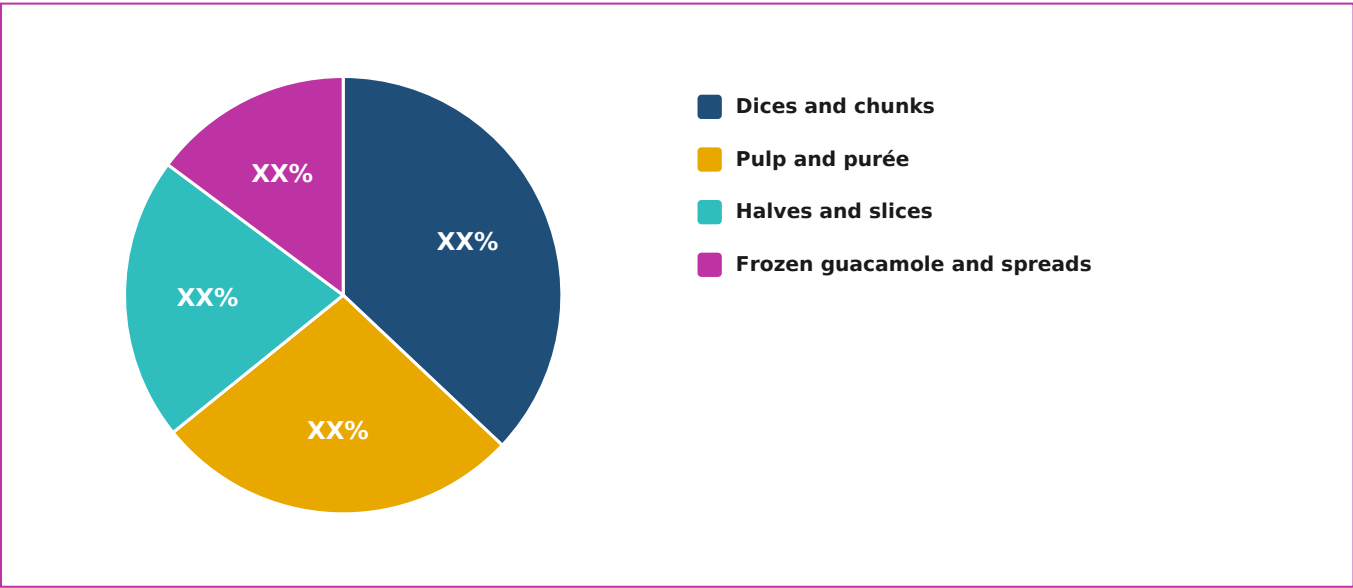
Source: XXX

Frozen Avocado Market Segmentation by Format, Processing, Packaging and Application

By Product Format

Dices and chunks dominate because they serve smoothies, bowls, prepared meals and portion-controlled foodservice recipes without requiring further cutting. Pulp and purée retain a large position in guacamole, sauces and industrial formulations. Frozen guacamole and spreads grow fastest as retailers and restaurant chains seek finished, labor-saving products with standardized seasoning and extended shelf life.

Value share by product Format, 2025



Source: XXX

Value by product Format, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Dices and chunks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pulp and purée	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Halves and slices	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Frozen guacamole and spreads	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Freezing and Processing Method

IQF processing leads because pieces remain separable, enable exact dosing and preserve shape more effectively than bulk blocks. Conventional block freezing remains relevant for industrial pulp and high-volume guacamole manufacture. HPP-assisted frozen formulations grow fastest as manufacturers combine

microbial control with clean-label positioning and improved refrigerated life after thawing.

Value by freezing and Processing Method, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Individually quick frozen	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Conventional block frozen	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
HPP-assisted frozen formulations	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging Format

Foodservice cartons and bulk pouches lead because restaurants prioritize low packaging cost, rapid handling and standardized portions. Retail resealable bags command a higher unit value and are gaining space beside mainstream frozen fruit. Industrial drums and totes remain essential for sauce, dip and prepared-food manufacturers purchasing pulp or purée.

Value by packaging Format, USD bn

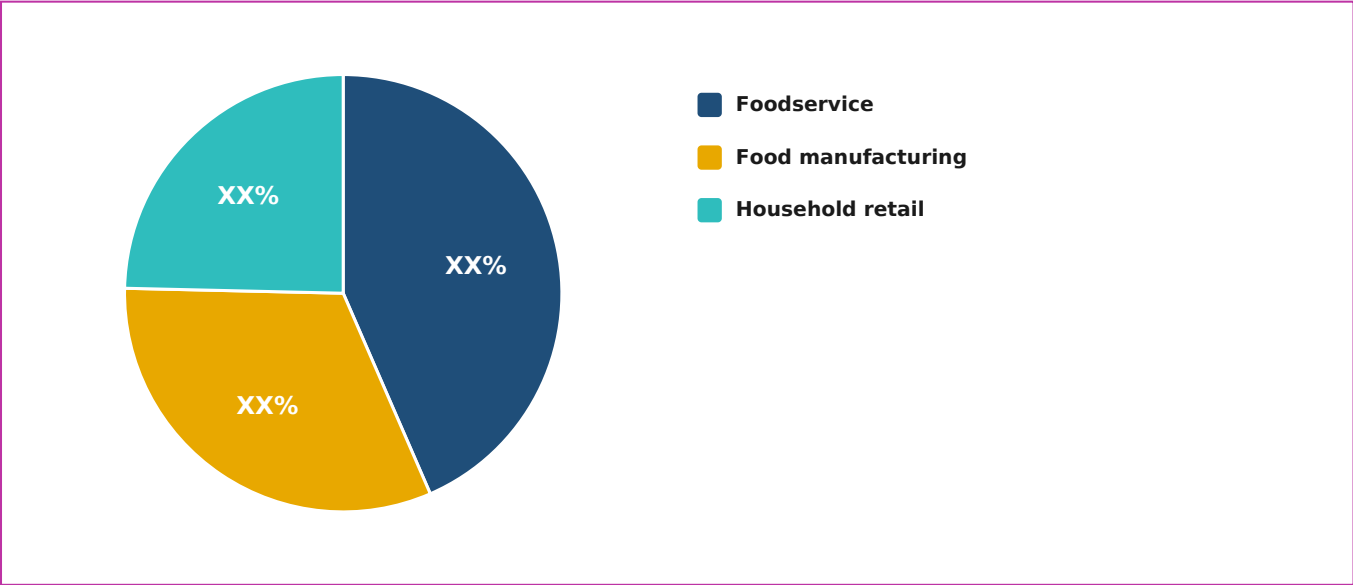
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Foodservice cartons and bulk pouches	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail resealable bags and tubs	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial drums, blocks and totes	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Foodservice is the largest application because frozen avocado directly reduces ripening labor, waste and portion variability across multi-unit operations. Food manufacturing consumes pulp, purée and dices in dips, sauces, sandwiches and ready meals. Household retail grows fastest as smoothie preparation, meal assembly and familiarity with frozen produce expand.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food manufacturing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Household retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Distributors lead by aggregating frozen deliveries and serving fragmented restaurants, caterers and institutions. Direct business-to-business contracts are favored by large chains and manufacturers that require proprietary formulations, audits and annual supply programs. Modern retail remains the principal consumer route, while online grocery and specialist frozen-food channels scale from a smaller base.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Foodservice and ingredient distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Direct business-to-business	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Modern retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online and specialty retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

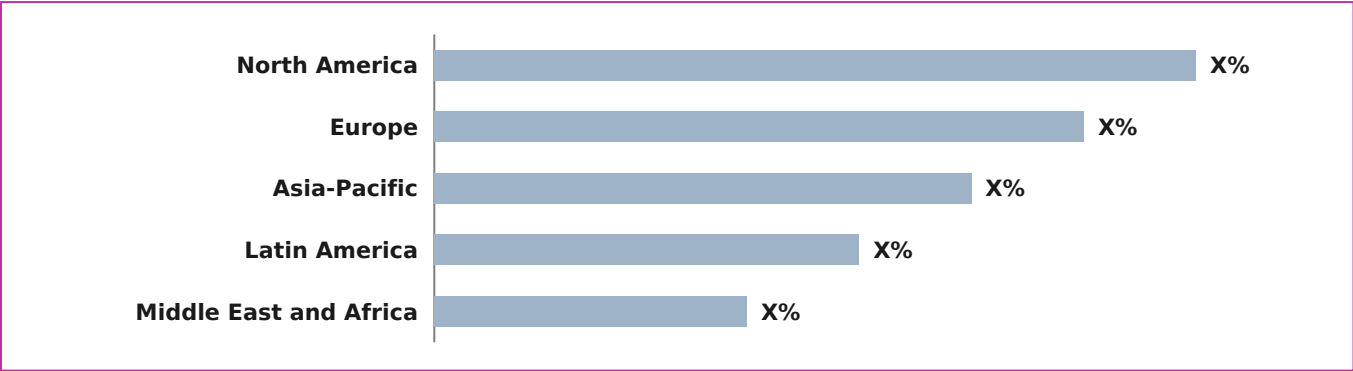
Frozen Avocado Market Regional Analysis and Country Outlook

North America generated XX% of global frozen avocado revenue in 2025. The United States anchors demand through Mexican restaurant chains, quick-service menus, prepared-food manufacturing and established frozen-fruit merchandising. Mexico is simultaneously the region's production center: its large Hass crop, proximity to US distribution networks and extensive guacamole-processing infrastructure support both private-label and branded supply.

Europe held XX% of market value, led by the United Kingdom, Germany, France, the Netherlands and Spain. Retail private label, meal-kit manufacturing and foodservice labor pressures are expanding demand, while the Netherlands and Spain operate as important import, processing and redistribution hubs. European procurement increasingly rewards traceable multi-origin supply, recyclable packaging and verified environmental performance.

Asia-Pacific is forecast to grow at XX% CAGR, the fastest regional rate. Japan and Australia provide the region's established base, while South Korea, China and India add new consumption occasions through cafés, smoothies, sushi, bowls and premium grocery. Frozen formats overcome inconsistent local ripening capability and allow operators to standardize recipes, although cold-chain reach and market-specific texture preferences remain decisive.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Frozen Avocado Market Competitive Landscape and Company Share

The frozen avocado market is moderately concentrated: the ten largest suppliers controlled XX% of global value in 2025. J.R. Simplot, Westfalia Fruit, MegaMex Foods and Calavo combine processing scale with established foodservice access, while Nature's Touch, Salud Foodgroup and regional specialists compete through IQF expertise, private-label flexibility and retailer relationships.

Vertical integration is becoming more valuable as raw-material volatility increases. Westfalia links orchards, sourcing, ripening and value-added manufacturing; Simplot operates large Mexican processing platforms; Mission Produce and Camposol bring diversified growing and distribution capabilities that can support further processed-product expansion. Multi-origin procurement reduces seasonal exposure and strengthens the ability to serve annual customer contracts.

Acquisitions and plant investment are expanding the addressable market. Westfalia's acquisition of Syros added European avocado-product development and private-label capability, while Simplot's Lagunillas investment modernized its Mexican processing footprint. Competitive strategy is moving toward clean-label formulations, restaurant-specific pack sizes, application support, traceability and total utilization of avocado flesh, stones and skins.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
J.R. Simplot Company	XXX	XXX	XXX	XXX
Westfalia Fruit Group	XXX	XXX	XXX	XXX
MegaMex Foods, LLC	XXX	XXX	XXX	XXX
Calavo Growers, Inc.	XXX	XXX	XXX	XXX
Nature's Touch Frozen Foods	XXX	XXX	XXX	XXX
Mission Produce, Inc.	XXX	XXX	XXX	XXX
Fresh Del Monte Produce Inc.	XXX	XXX	XXX	XXX
Camposol Holding PLC	XXX	XXX	XXX	XXX
Salud Foodgroup Europe B.V.	XXX	XXX	XXX	XXX
Frutex Australia Pty Ltd.	XXX	XXX	XXX	XXX

Source: XXX

Frozen Avocado Market Forecast and Commercial Opportunities

Global revenue will rise from USD XXX billion in 2025 to USD XXX billion in 2031, while volume expands from XXX to XXX metric tons. Volume growth will provide most of the increase, with premium IQF cuts, organic certification, smaller packs and higher specification requirements supporting a measured improvement in average selling prices.

The central forecast assumes continued expansion of Mexican and Peruvian processing supply, broader use of Colombian and African origins, and sustained foodservice adoption. A stronger scenario emerges if thawed texture improves quickly enough to move IQF slices into visible salad and bowl applications; the downside scenario centers on consecutive crop shocks, high cold-chain energy costs and trade interruptions.

Winning suppliers will combine orchard-level traceability, multiple harvest calendars, rapid freezing near production areas and local market finishing or distribution. Product portfolios must serve both high-volume foodservice users and retail customers seeking simple ingredients, resealable packaging and clear preparation guidance.

Opportunities

- Clean-label IQF avocado without preservatives
- Single-serve foodservice portions
- Private-label frozen avocado for European retailers
- Smoothie and beverage applications in Asia-Pacific
- Organic and verified regenerative supply
- Avocado blends with pulses, herbs and functional ingredients
- Valorization of seeds, skins and off-grade fruit

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