



Global Frozen Spinach 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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Market at a glance

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Indicator	Value
Market size (2025)	USD 1.8 bn
Forecast (2031)	USD 2.6 bn
CAGR (2021-2031)	6.8%
Study period	2021-2031
Largest region	Europe · 34.8%
Fastest-growing region	Asia-Pacific · 8.2%
Market concentration	Moderate
Licence	Individual / Company

The global frozen spinach market reached USD XXX billion in 2025 and is forecast to generate USD XXX billion by 2031, expanding at a CAGR of XX%. Demand is being reinforced by private-label growth, year-round availability, plant-forward meal formulation and wider use of portion-controlled spinach in foodservice and industrial applications. Europe remains the largest regional market with a XX% value share, while Asia-Pacific is advancing fastest at an XX% CAGR. The report quantifies market value, volume, pricing, product formats, organic penetration, pack sizes, channels, regional demand and company positioning.

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Executive summary

The global frozen spinach market reached USD XXX billion in 2025 and is forecast to generate USD XXX billion by 2031, expanding at a CAGR of XX%. Demand is being reinforced by private-label growth, year-round availability, plant-forward meal formulation and wider use of portion-controlled spinach in foodservice and industrial applications. Europe remains the largest regional market with a XX% value share, while Asia-Pacific is advancing fastest at an XX% CAGR. The report quantifies market value, volume, pricing, product formats, organic penetration, pack sizes, channels, regional demand and company positioning.

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

Key findings

- Global frozen spinach sales reached USD XXX billion and XXX tonnes in 2025.
- The market will add USD XXX million between 2025 and 2031, reaching USD XXX billion.
- Chopped and cut spinach represented XX% of 2025 market value, supported by its versatility in retail, catering and prepared-food production.
- Retail accounted for XX% of market value in 2025, with supermarket private labels controlling a substantial portion of European category volumes.
- Europe held a XX% market share in 2025, reflecting established frozen-vegetable consumption and dense processing capacity in Belgium, France, Poland and Spain.
- Asia-Pacific will expand at an XX% CAGR through 2031 as cold-chain coverage, modern retail and frozen convenience-food production broaden.
- Organic frozen spinach generated XX% of 2025 value and will grow at an XX% CAGR, ahead of the conventional segment.
- USDA Economic Research Service reported that frozen spinach accounted for approximately XX% of US processing-spinach availability in its 2021 vegetable outlook.

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 Spinach Market Trends and Growth Drivers

Frozen spinach occupies a defensible position between fresh produce and prepared frozen meals. It converts a perishable leafy crop into a stable, portionable ingredient with consistent yield, enabling processors to address households, restaurants, public-sector caterers and food manufacturers from the same production base.

Demand growth is moving beyond basic chopped blocks toward leaf formats, pellets, cubes, organic products and seasoned preparations. These formats improve convenience and unit economics, but they also require tighter control of blanching, colour retention, portion weight, packaging integrity and cold-chain performance.

Supply economics remain shaped by contracted acreage, narrow harvest windows, factory proximity and energy-intensive freezing. Scale operators are responding through grower partnerships, automated inspection and packing, regenerative-agriculture programmes and multi-format plants capable of serving private-label, foodservice and industrial customers.

Growth drivers

Plant-forward eating expands the consumption base

Spinach benefits from consumer demand for vegetable-dense meals, plant-based recipes and nutrient-rich ingredients. Frozen formats allow households and professional kitchens to incorporate spinach without the rapid deterioration and preparation losses associated with fresh leaves.

Portion-controlled convenience accelerates repeat purchase

Pellets, cubes and individually portioned blocks let users remove only the quantity required, reducing preparation time and household waste. The format is particularly effective in sauces, smoothies, soups, curries, pasta fillings and infant-food preparation.

Private-label frozen ranges widen household access

Retailers use frozen spinach as a high-rotation staple within affordable vegetable assortments. Broad private-label distribution raises shelf availability, supports larger pack formats and encourages manufacturers to compete through agricultural sourcing, quality and packing efficiency.

Foodservice kitchens substitute toward stable inventory

Restaurants, schools, hospitals and contract caterers value predictable yield, labour savings and year-round supply. Frozen chopped spinach also provides consistent portion cost, colour and solids content across high-volume recipes.

Emerging-market cold chains unlock distribution

Investment in modern grocery, freezer cabinets, temperature-controlled logistics and frozen-food manufacturing is extending category reach across Asian and Middle Eastern cities. Local repacking and

regional processing will make frozen spinach more accessible beyond premium import channels.

Shelf-life economics reduce food waste

Frozen spinach can be held for extended periods and portioned across multiple meals, improving usable yield for households and commercial kitchens. This economic advantage strengthens during periods of volatile fresh-produce availability and high food inflation.

Restraints

Crop and energy volatility compress processor margins

Spinach quality and yield are sensitive to heat, excessive rainfall, water constraints and harvest timing, while blanching and rapid freezing require significant energy input. Processors with weak contracting positions face simultaneous raw-material, labour and utility exposure.

Microbiological incidents raise compliance costs

Listeria, Salmonella and other contamination events can produce recalls, customer delisting and extended sanitation shutdowns. Suppliers are increasing environmental monitoring, validated blanching controls, segregation and finished-product testing to protect retailer and foodservice contracts.

Fresh spinach retains premium meal occasions

Fresh leaves dominate salads and visible garnishing applications where texture and appearance determine purchase. Frozen spinach consequently competes most effectively in cooked recipes, limiting its addressable share of total spinach consumption.

Cold-chain gaps constrain emerging-market penetration

Intermittent electricity, limited frozen warehousing and weak temperature control reduce product quality and raise landed costs outside major urban centres. These constraints slow distribution even where underlying demand for convenient vegetables is rising.

Frozen Spinach Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Plant-forward eating expands the consumption base	XXX	XXX	XXX
Portion-controlled convenience accelerates repeat purchase	XXX	XXX	XXX
Private-label frozen ranges widen household access	XXX	XXX	XXX
Foodservice kitchens substitute toward stable inventory	XXX	XXX	XXX
Emerging-market cold chains unlock distribution	XXX	XXX	XXX
Shelf-life economics reduce food waste	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Crop and energy volatility compress processor margins	XXX	XXX	XXX
Microbiological incidents raise compliance costs	XXX	XXX	XXX
Fresh spinach retains premium meal occasions	XXX	XXX	XXX
Cold-chain gaps constrain emerging-market penetration	XXX	XXX	XXX

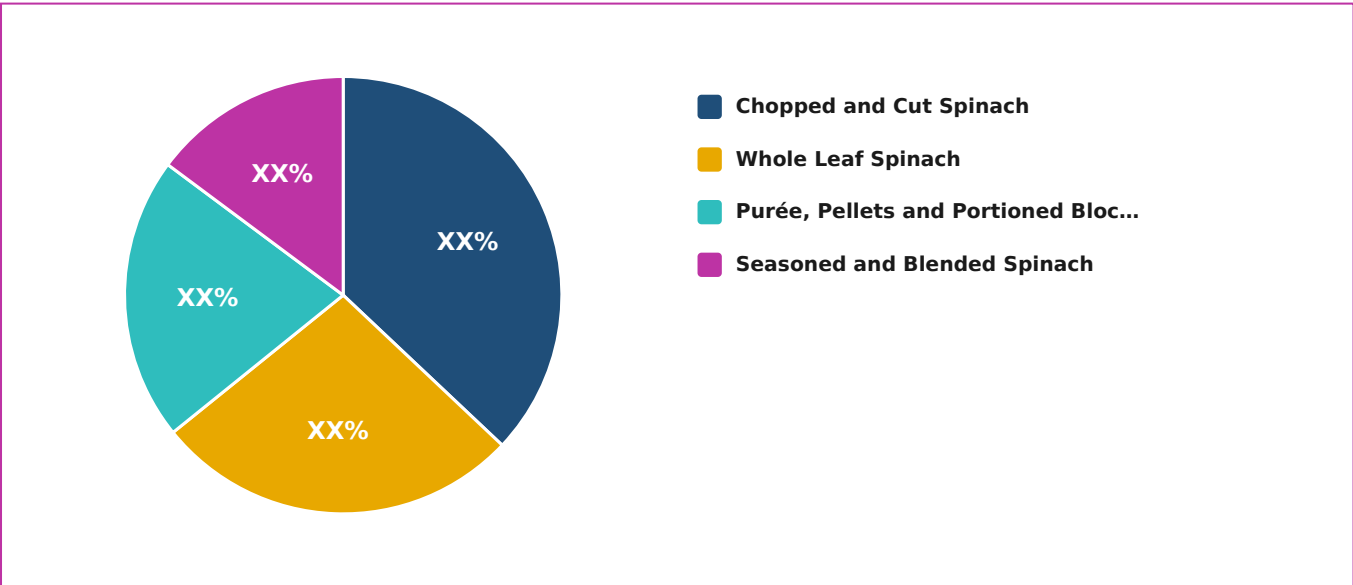
Source: XXX

Frozen Spinach Market Segmentation by Format, Nature, Pack Size and Channel

By Product Format

Chopped spinach is the principal commercial format because it serves household cooking, foodservice recipes and industrial fillings with limited additional preparation. Whole-leaf products retain a premium position in visible side dishes, while puréed blocks, pellets and cubes are gaining share through dosage control and compatibility with sauces, smoothies and infant-food recipes.

Value share by product Format, 2025



Source: XXX

Value by product Format, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Chopped and Cut Spinach	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Whole Leaf Spinach	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Purée, Pellets and Portioned Blocks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Seasoned and Blended Spinach	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Nature

Conventional spinach dominates through broad agricultural availability and competitive pricing for private-label and institutional contracts. Organic products command higher realisations and are gaining space in premium retail, baby-food and natural-food channels, particularly in Western Europe and North America.

Value by nature, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Pack Size

Small retail packs lead in value because of higher unit pricing and broad supermarket distribution. Medium foodservice packs balance handling efficiency with kitchen throughput, while industrial bulk cases serve manufacturers of meals, sauces, bakery products and vegetable preparations at lower per-kilogram prices.

Value by pack Size, USD bn

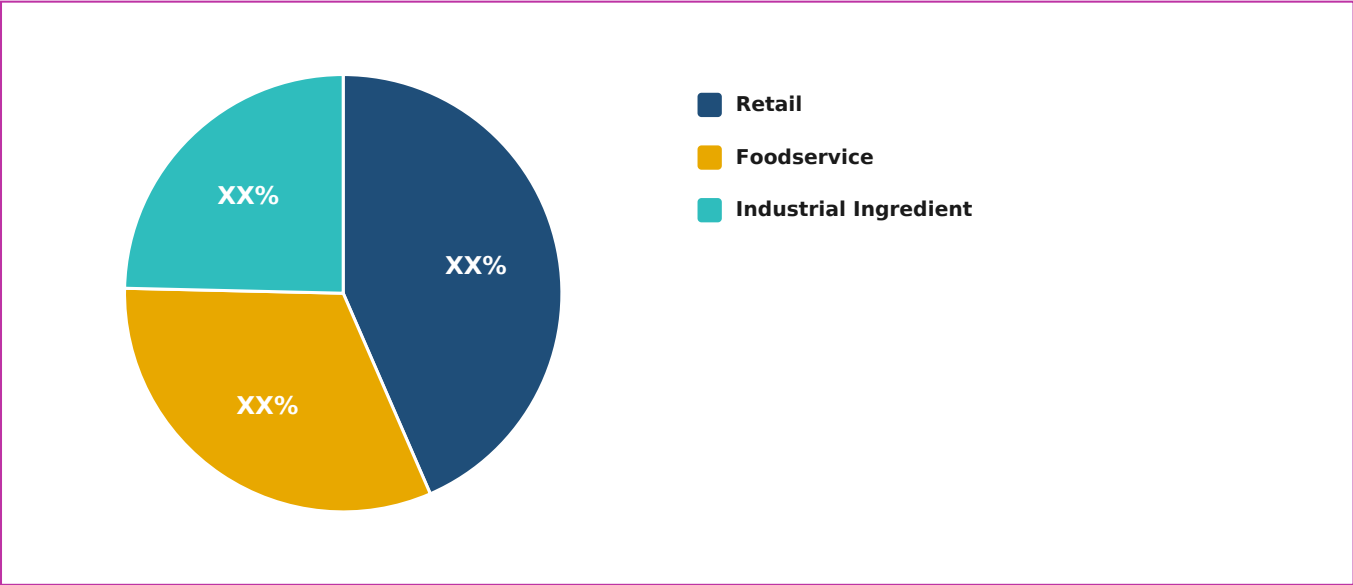
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Retail Packs up to 1 kg	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice Packs above 1 kg to 10 kg	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial Packs above 10 kg	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Supermarkets and hypermarkets remain the primary route to market through branded and private-label frozen-vegetable ranges. Foodservice is gaining share as caterers, healthcare providers and restaurant kitchens adopt portionable vegetables, while industrial buyers require specification-led supply based on cut size, solids content, microbiological controls and pack configuration.

Value share by distribution Channel, 2025



Source: XXX

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial Ingredient	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

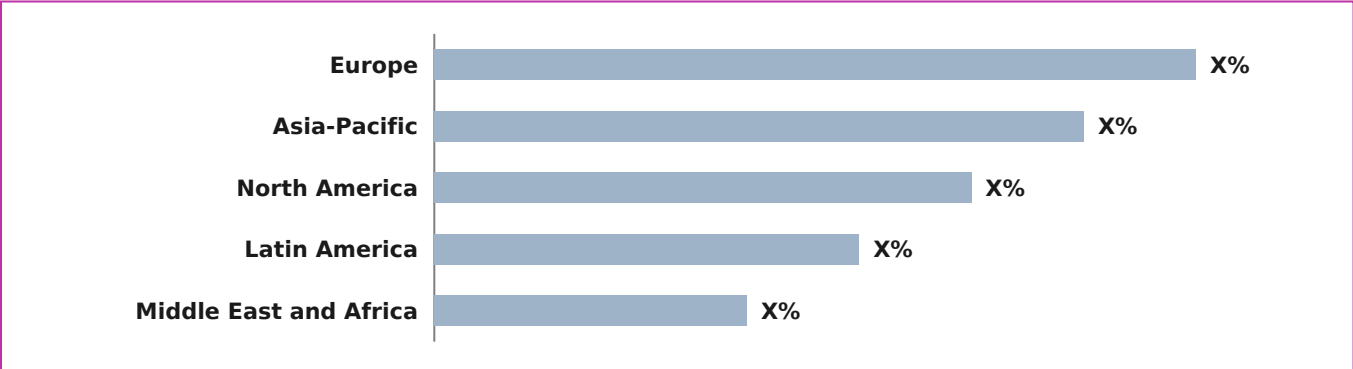
Frozen Spinach Market Regional Analysis and Country Outlook

Europe generated XX% of global market value in 2025. High household familiarity with frozen vegetables, extensive retailer private-label programmes and an established processing corridor spanning Belgium, France, the Netherlands, Poland and Spain sustain the region's lead. Germany is the largest European demand centre, while France combines strong domestic consumption with contracted vegetable production and industrial freezing capacity.

Asia-Pacific is forecast to grow at an XX% CAGR through 2031, the fastest regional rate. China combines a large spinach-growing base with expanding frozen-food manufacturing, while Japan and South Korea support higher-value retail and foodservice demand. India and Southeast Asia provide the strongest incremental whitespace as organised retail, restaurant chains and urban freezer ownership increase.

North America remains a mature but attractive market for organic retail packs, institutional foodservice and ingredient-grade chopped spinach. Latin America benefits from expanding modern grocery in Brazil and Mexico, while Middle East and Africa demand is concentrated in Gulf import markets, South Africa and urban hospitality channels where dependable year-round supply is valued.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	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 Spinach Market Competitive Landscape and Company Share

The frozen spinach market is moderately concentrated at the processing level but fragmented across brands, private labels and regional packers. Greenyard, Ardo, Bonduelle and Nomad Foods hold strong positions in Europe, while Conagra Brands, Pictsweet Farms, B&G Foods, Hanover Foods, Lakeside Foods, Stahlbush Island Farms and Sno Pac Foods shape North American retail and foodservice supply.

Leadership depends on proximity to contracted growing areas, blanching and freezing throughput, agronomic support, residue-control programmes and packing flexibility. Large processors increasingly sell the same agricultural platform through retailer brands, foodservice cases, industrial bulk packs and branded consumer lines, improving plant utilisation and customer diversification.

Recent strategy has centred on automated packing, dedicated spinach lines, sustainable agriculture and consolidation. Greenyard added spinach capacity in France and automated packing in Poland, while its proposed frozen-vegetable partnership with Gelagri Bretagne would deepen French sourcing and processing. Ardo has reinforced its long-term investment base and introduced financial incentives for growers adopting regenerative practices.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Greenyard NV	XXX	XXX	XXX	XXX
Ardo NV	XXX	XXX	XXX	XXX
Bonduelle Group	XXX	XXX	XXX	XXX
Nomad Foods Limited	XXX	XXX	XXX	XXX
Conagra Brands, Inc.	XXX	XXX	XXX	XXX
Pictsweet Farms	XXX	XXX	XXX	XXX
B&G Foods, Inc.	XXX	XXX	XXX	XXX
Hanover Foods Corporation	XXX	XXX	XXX	XXX
Stahlbush Island Farms	XXX	XXX	XXX	XXX
Sno Pac Foods, Inc.	XXX	XXX	XXX	XXX

Source: XXX

Frozen Spinach Market Forecast and Commercial Opportunities

The market will advance from USD XXX billion in 2025 to USD XXX billion in 2031. Volume growth will remain the primary contributor, while organic certification, portionable formats, prepared variants and packaging improvements will sustain a positive value mix. Foodservice and Asia-Pacific will contribute a rising share of incremental demand.

Under the central forecast, processors secure sufficient contracted acreage and energy costs remain manageable, allowing value growth to hold at XX%. An accelerated scenario built around faster institutional adoption and emerging-market cold-chain investment lifts growth above XX%, while repeated crop shortfalls or major food-safety incidents would hold the market closer to XX%.

The strongest performers will integrate farm planning with rapid post-harvest freezing, automate visual inspection and portioning, and offer both cost-efficient private label and differentiated organic products. Commercial advantage will increasingly depend on traceable field practices, measurable agricultural resilience and the ability to supply multiple pack sizes from a common processing network.

Opportunities

- Premium organic and regenerative-certified spinach
- Single-serve pellets, cubes and steamable retail packs
- Foodservice formats for schools, healthcare and quick-service restaurants
- Local processing partnerships in India, Southeast Asia and the Middle East
- Spinach components for plant-based meals, sauces, bakery fillings and infant-food formulations
- Recyclable mono-material bags and lower-energy freezing systems

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