



Global Saffron 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 0.7 bn
Forecast (2031)	USD 1 bn
CAGR (2021-2031)	7.1%
Study period	2021-2031
Largest region	Asia-Pacific · 41%
Fastest-growing region	North America · 8.4%
Market concentration	Low
Licence	Individual / Company

The global saffron market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a CAGR of XX%. Asia-Pacific accounted for XX% of market value, supported by established consumption in India and China and the concentration of production across Iran, Afghanistan and Kashmir. Demand is shifting toward traceable whole threads, certified premium grades and standardized extracts for nutraceutical and personal-care formulations. Supply-chain formalization, origin certification and laboratory authentication are becoming decisive sources of pricing power.

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Executive summary

The global saffron market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a CAGR of XX%. Asia-Pacific accounted for XX% of market value, supported by established consumption in India and China and the concentration of production across Iran, Afghanistan and Kashmir. Demand is shifting toward traceable whole threads, certified premium grades and standardized extracts for nutraceutical and personal-care formulations. Supply-chain formalization, origin certification and laboratory authentication are becoming decisive sources of pricing power.

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

Key findings

- The global saffron market was valued at USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Whole and cut threads generated XX% of 2025 market value, reflecting stronger authenticity signals and superior price realization.
- Food and beverage applications represented XX% of market value in 2025, while nutraceutical and pharmaceutical demand will expand at an XX% CAGR.
- Asia-Pacific held XX% of global market value in 2025; North America will post the fastest regional CAGR at XX%.
- Spain exported USD XXX million of saffron under HS 091020 in 2023, including USD XXX million shipped to the United States.
- India imported USD XXX million of saffron in 2023, making it one of the world's largest reported national import markets.
- Afghanistan cultivated saffron across XXX hectares and harvested approximately 40 metric tons in solar year 1403, with Herat contributing XX% of output.
- Iran produced more than 238 metric tons of saffron in 2023/24, retaining its position as the central source of global primary supply.

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 Saffron Market Trends and Growth Drivers

Saffron economics are governed by an unusual combination of biological scarcity, manual harvesting and intense value concentration in a few grams of finished product. The market therefore reacts strongly to changes in flowering yields, labor availability, drying quality and the efficiency with which exporters convert fragmented farm output into consistent commercial lots.

Demand is becoming more segmented. Culinary buyers continue to prioritize aroma, color and thread appearance, while nutraceutical and cosmetic formulators require reproducible chemical profiles, documentation and dependable annual supply. This divergence is creating separate pricing ladders for origin-led retail saffron and specification-led industrial extracts.

Traceability is the central competitive mechanism across both segments. Origin certification, ISO-aligned testing, contaminant controls and tamper-resistant packaging increase market access and allow suppliers to capture value that previously accrued to intermediaries in Spain, India and the Gulf.

Growth drivers

Premium culinary ingredients

Higher-income households, chefs and premium packaged-food manufacturers are increasing expenditure on distinctive natural ingredients with strong provenance. Saffron benefits from its established role in Persian, Indian, Mediterranean and Gulf cuisines, while smaller retail pack sizes make premium grades accessible without materially raising the total meal cost.

Nutraceutical extract adoption

Standardized saffron extracts are moving into mood, sleep, eye-health and women's-health formulations. Extract producers obtain higher value per kilogram and can specify crocin, picrocrocin and safranal profiles, widening the addressable market beyond culinary buyers.

Authentication and origin certification

ISO testing, Codex specifications, geographical indications and independent laboratory certificates reduce buyer uncertainty in a category exposed to dilution and substitution. Verified origin and chemical-quality profiles support premium pricing and increase acceptance by regulated food, supplement and cosmetic customers.

Digital specialty retail

E-commerce gives origin-based producers and specialist packers direct access to consumers outside traditional ethnic-food channels. Product education, certificate disclosure and subscription or gifting formats raise conversion rates for premium threads and reduce dependence on conventional distributors.

Natural color and fragrance demand

Food, beauty and fragrance manufacturers are increasing their use of recognizable botanical ingredients. Saffron's coloring strength, aroma and luxury positioning allow suppliers to participate in natural-color, prestige skincare and fine-fragrance formulations at higher unit values.

Cultivation and processing technology

Controlled-environment cultivation, precision climate management, improved corm selection and modern drying equipment can raise consistency and extend production beyond traditional growing districts. Investments in Afghanistan, Uzbekistan, Israel and Europe will broaden the supply base and improve year-round processing utilization.

Restraints

Labor-intensive harvesting

Each *Crocus sativus* flower produces three stigmas, and harvesting and separation remain highly dependent on manual labor during a narrow flowering period. Wage inflation, rural labor shortages and timing failures raise production costs and can cause rapid losses in quality.

Adulteration and quality disputes

Substitution with dyed fibers, excess floral material and undeclared fillers damages consumer confidence and increases testing costs. Powdered saffron is particularly exposed because visual verification is difficult, constraining growth among first-time consumers and regulated manufacturers.

Climate and water stress

Drought, temperature variability and declining water availability affect flowering intensity and corm performance in Iran, Kashmir and other established production areas. Concentrated origin risk translates quickly into procurement competition and wholesale-price volatility.

Trade and payment friction

Sanctions exposure, restricted banking channels, indirect routing and customs-documentation requirements complicate transactions involving Iranian supply. Additional intermediaries reduce producer realization, obscure origin and increase landed costs for compliant international buyers.

Saffron Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Premium culinary ingredients	XXX	XXX	XXX
Nutraceutical extract adoption	XXX	XXX	XXX
Authentication and origin certification	XXX	XXX	XXX
Digital specialty retail	XXX	XXX	XXX
Natural color and fragrance demand	XXX	XXX	XXX
Cultivation and processing technology	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Labor-intensive harvesting	XXX	XXX	XXX
Adulteration and quality disputes	XXX	XXX	XXX
Climate and water stress	XXX	XXX	XXX
Trade and payment friction	XXX	XXX	XXX

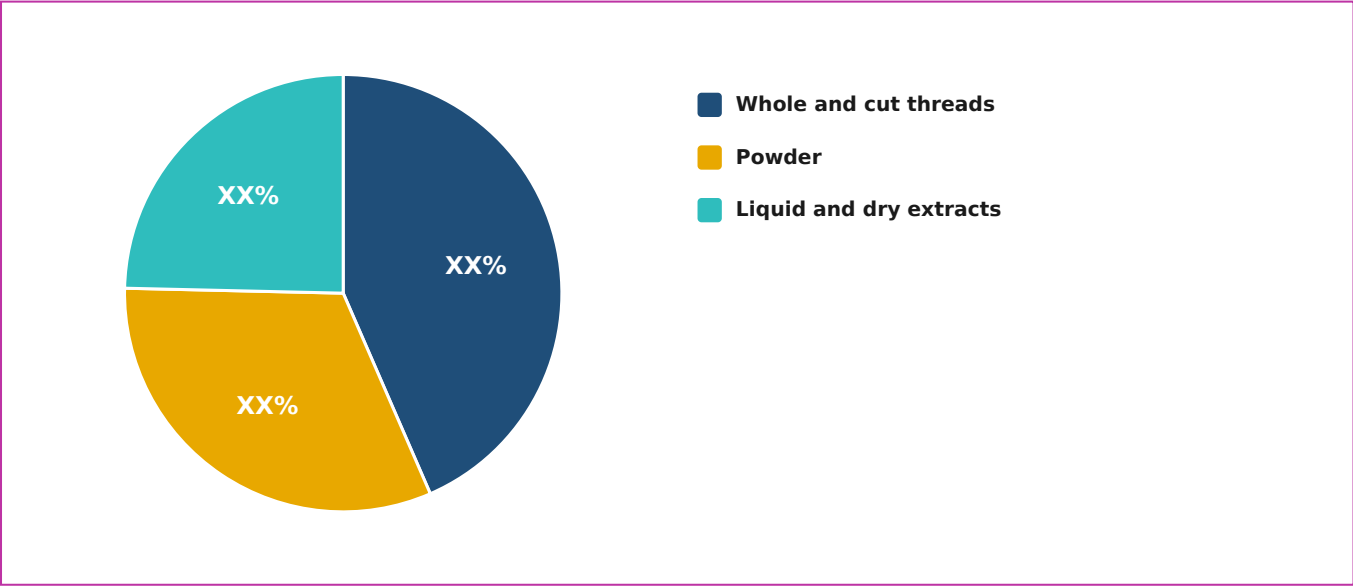
Source: XXX

Saffron Market Segmentation by Form, Grade, Application and Channel

By Form

Threads retain the highest share because their visual integrity signals authenticity and supports premium household, foodservice and gifting prices. Powder offers dosing convenience for industrial food production but faces greater authentication requirements. Extracts will expand fastest as supplement, pharmaceutical, beverage and cosmetic formulators demand standardized active-compound profiles.

Value share by form, 2025



Source: XXX

Value by form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Whole and cut threads	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Powder	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Liquid and dry extracts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Grade

Category I and origin-certified premium lots command the largest value share due to stronger coloring strength, lower floral waste and suitability for branded retail and extracts. Category II remains important for food manufacturing and mainstream culinary products. Category III and unclassified commercial grades serve price-sensitive industrial and regional markets but will lose value share as testing and traceability

standards tighten.

Value by grade, USD bn

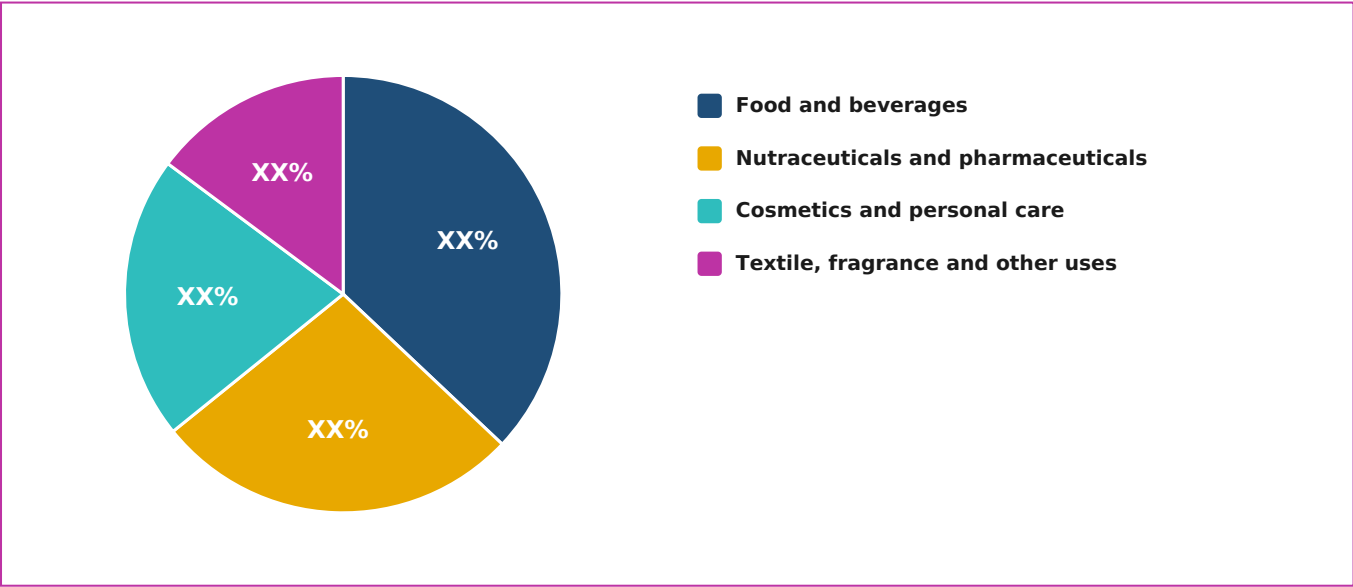
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
ISO Category I and premium equivalent	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
ISO Category II and standard grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
ISO Category III and commercial grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Culinary demand remains the market's foundation across rice dishes, bakery, confectionery, dairy, beverages and premium foodservice. Nutraceutical and pharmaceutical buyers are increasing purchases of reproducible extracts suited to clinically positioned formulations. Cosmetics and personal care will gain share through prestige skincare, fragrance and natural-color applications.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Food and beverages	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Nutraceuticals and pharmaceuticals	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cosmetics and personal care	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Textile, fragrance and other uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Direct B2B and importer-distributor channels lead because processors, food manufacturers and formulators procure tested lots in bulk. Specialty stores retain an important role in culinary education and origin-led selling. Online retail is the fastest-growing channel as brands use laboratory certificates, harvest information and direct sourcing narratives to overcome consumer uncertainty.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Business-to-business and distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialty and ethnic retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supermarkets and hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Price Tier

Premium and super-premium lots benefit from origin certification, Category I performance, attractive thread presentation and gift-ready packaging. Mid-tier saffron remains the volume center for regular culinary use and foodservice. Economy products face the greatest pressure from authenticity enforcement and will record the slowest growth.

Value by price Tier, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Premium and super-premium	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Mid-tier	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Economy	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

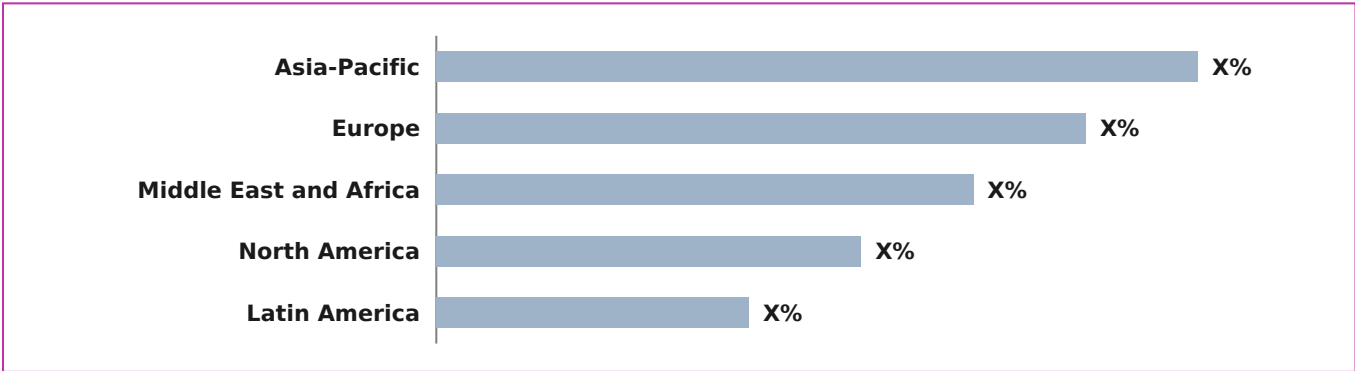
Saffron Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global saffron market value in 2025. Iran anchors upstream supply, while India combines Kashmir production with substantial imports for household consumption, foodservice and repacking. India imported USD XXX million under HS 091020 in 2023, and premium demand is increasingly organized around GI-tagged Kashmir saffron, certified grading and e-auction infrastructure.

Europe accounted for XX% of market value, led by Spain, Italy, France, Germany and the United Kingdom. Spain is simultaneously a culinary market, processing center and redistribution hub: its 2023 saffron exports reached USD XXX million, with the United States, Italy, Sweden, France and the United Arab Emirates among leading destinations. Krokos Kozanis PDO in Greece and La Mancha origin positioning in Spain reinforce Europe's premium, traceable segment.

North America will be the fastest-growing region at an XX% CAGR through 2031. Growth is concentrated in standardized supplement extracts, premium e-commerce, specialty grocery and chef-led adoption. The Middle East and Africa remains a major consumption and trading zone, with Gulf gifting and hospitality demand complemented by Afghanistan's expanding output and the United Arab Emirates' role as a processing and re-export center.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

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

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

Saffron Market Competitive Landscape and Company Share

The global saffron market remains structurally fragmented, with thousands of growers supplying regional processors, exporters and branded packers. The leading ten commercial groups account for XX% of global market value, giving the market a Low concentration rating. Scale is expressed through procurement networks, grading laboratories, cleaning and drying capacity, export documentation and brand access rather than ownership of extensive farmland.

Iranian companies including Novin Saffron, Saharkhiz, Bahraman, Rowhani Saffron and Tarvand control deep sourcing relationships and broad retail-to-industrial portfolios. Spanish firms such as Verdú Cantó Saffron Spain and Safrante occupy influential positions in European packing, private label and international distribution, while the Kozani cooperative controls an origin-protected Greek supply base. Rumi Spice and Heray Spice compete through Afghan provenance, direct farmer relationships and premium North American channels.

Investment is moving toward traceability, standardized extracts, automated processing and controlled-environment cultivation. The EUR XXX BlueRedGold financing led by Paulig's PINC venture arm and the planned Jafza processing facility involving Kesar Expert & Packers demonstrate two complementary strategies: technology-led supply creation and large-scale regional processing. Successful competitors will combine secure multi-origin procurement with ISO-aligned testing and consumer-facing proof of authenticity.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Novin Saffron Company	XXX	XXX	XXX	XXX
Saharkhiz Saffron	XXX	XXX	XXX	XXX
Bahraman Saffron	XXX	XXX	XXX	XXX
Rowhani Saffron Company	XXX	XXX	XXX	XXX
Tarvand Saffron	XXX	XXX	XXX	XXX
Verdú Cantó Saffron Spain	XXX	XXX	XXX	XXX
Safrante Global Company	XXX	XXX	XXX	XXX
Cooperative de Safran Kozanis	XXX	XXX	XXX	XXX
Rumi Spice	XXX	XXX	XXX	XXX
Heray Spice	XXX	XXX	XXX	XXX
Kesar Expert & Packers	XXX	XXX	XXX	XXX
BMB Holding	XXX	XXX	XXX	XXX

Source: XXX

Saffron Market Forecast and Commercial Opportunities

The market will add approximately USD XXX million in annual value between 2025 and 2031. Food and beverage uses will remain dominant, but nutraceutical, pharmaceutical and cosmetic applications will contribute a disproportionate share of incremental revenue because their standardized extracts command higher processing margins and support repeat business-to-business contracts.

The base-case forecast assumes improving Afghan output, gradual expansion of controlled-environment projects and continued Iranian supply leadership. A tighter-supply scenario driven by drought and trade friction would lift nominal market value through price escalation while constraining physical volume; a technology-acceleration scenario would increase certified output and broaden mainstream product adoption.

Winning portfolios will center on whole-thread premium products, documented origin, tamper-evident packaging and application-specific extracts. Suppliers that publish laboratory results, segregate lots by harvest and origin, and build direct relationships with formulators and premium retailers will outperform undifferentiated commodity traders.

Opportunities

- Standardized crocin and safranal extracts
- Blockchain-supported farm-to-pack traceability
- Premium single-origin retail formats
- Indoor and climate-controlled saffron cultivation
- Geographical-indication-led tourism and export branding
- Direct sourcing partnerships with producer cooperatives

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