

Global Baker's Yeast Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

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 5.7 bn
Forecast (2031)	USD 8.2 bn
CAGR (2021-2031)	6.4%
Study period	2021-2031
Largest region	Europe · 31.4%
Fastest-growing region	Asia-Pacific · 7.9%
Market concentration	Moderate
Licence	Individual / Company

The global baker's yeast market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a CAGR of XX%. Active dry and instant yeast account for XX% of market value as industrial bakeries, foodservice operators and households prioritize storage stability and precise dosing. Europe remains the largest regional market with a XX% share, while Asia-Pacific is the fastest-growing region at a XX% CAGR. Capacity localization, strain performance, fermentation consistency and technical bakery support are becoming the principal sources of competitive advantage.

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Executive summary

The global baker's yeast market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a CAGR of XX%. Active dry and instant yeast account for XX% of market value as industrial bakeries, foodservice operators and households prioritize storage stability and precise dosing. Europe remains the largest regional market with a XX% share, while Asia-Pacific is the fastest-growing region at a XX% CAGR. Capacity localization, strain performance, fermentation consistency and technical bakery support are becoming the principal sources of competitive advantage.

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

Key findings

- The global baker's yeast market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Active dry and instant yeast represented XX% of 2025 market value and will grow at a XX% CAGR through 2031.
- Bread and rolls accounted for XX% of demand value in 2025, supported by their role as staple foods across both mature and developing economies.
- Europe held XX% of global market value in 2025, while Asia-Pacific will post the fastest regional CAGR at XX%.
- Industrial bakeries generated XX% of market value, but artisanal and craft bakeries will expand at a faster XX% CAGR.
- Angel Yeast reported XXX tonnes of total yeast fermentation output in 2024, an increase of XX% from 2023.
- AB Mauri operates 52 plants across 32 countries and sells yeast and bakery ingredients in more than 100 countries.
- Bakery and starch-based product manufacturing employed XX% of the EU food and beverage processing workforce in 2023, according to Eurostat.

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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

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Global Baker's Yeast Market Trends and Growth Drivers

Baker's yeast demand is anchored in staple-food consumption, but revenue growth increasingly comes from changes in bakery organization rather than population alone. Automated plants, frozen-dough systems and multi-site foodservice operators require tightly controlled fermentation performance, creating a larger addressable market for strain-specific and technically supported products.

The shift toward dry yeast is restructuring distribution economics. Stable products allow manufacturers to serve smaller bakeries across wider territories, reduce spoilage and build retail brands, while fresh yeast remains competitive in dense production clusters with established refrigerated delivery routes.

On the supply side, fermentation economics depend on molasses quality, aeration energy, water availability and effluent treatment. Scale provides purchasing and process advantages, but local technical service and adaptation to flour variability remain decisive in customer retention.

Growth drivers

Industrial Bread Capacity Expansion

Large bakeries are adding automated lines to meet urban demand for packaged bread, buns and rolls with consistent shelf life. These plants require standardized yeast activity, predictable proofing times and supplier technical support, increasing both contracted volumes and the value captured by performance-grade formulations.

Instant Dry Yeast Adoption

Instant dry yeast removes refrigeration requirements and can be blended directly with flour, lowering handling costs for distributors, small bakeries and households. Adoption is strongest where fragmented bakery networks and warm climates make fresh-yeast distribution difficult.

Foodservice Pizza and Bun Demand

Quick-service restaurants, delivery-focused pizza chains and café-bakery networks are expanding standardized dough production. Their demand favors yeast products engineered for refrigerated fermentation, frozen dough recovery and consistent performance across centralized and in-store preparation.

Artisan Bread Premiumization

Consumers are paying more for crusty loaves, brioche, regional breads and products marketed around fermentation quality. Artisan operators consequently purchase strain-specific yeast and integrated fermentation solutions that deliver aroma, volume and tolerance across longer production schedules.

Bakery Automation and Process Control

Automated mixing, dividing, proofing and baking lines narrow acceptable performance tolerances for yeast. This raises demand for highly consistent products, supplier quality documentation and digital dosing

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compatibility, supporting premium pricing for technically differentiated yeast.

Modern Retail and E-commerce Penetration

Supermarkets, wholesalers and online platforms are widening access to retail sachets and professional dry-yeast packs. Improved product availability expands home baking and enables small commercial bakeries to purchase branded yeast outside traditional wholesale networks.

Restraints

Molasses and Energy Cost Volatility

Molasses is the principal fermentation feedstock, while aeration, separation and drying make yeast production energy intensive. Sharp input-cost movements compress margins where annual bakery contracts delay price recovery and can raise selling prices enough to encourage dose optimization.

Fermentation Effluent Compliance

Yeast plants generate organic wastewater requiring substantial treatment capacity and continuous environmental control. Tighter discharge requirements raise capital expenditure, increase barriers to new capacity and can constrain older plants located in water-stressed industrial zones.

Alternative Leavening Systems

Sourdough starters, hybrid fermentation systems and chemical leaveners compete with conventional baker's yeast in selected products. The effect is concentrated in premium artisan bread and chemically leavened snack categories rather than mainstream packaged bread.

Fresh Yeast Distribution Constraints

Fresh compressed and liquid yeast require short replenishment cycles, temperature control and disciplined inventory rotation. Losses and service costs restrict penetration beyond dense bakery clusters and accelerate substitution by instant dry formats in remote markets.

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Baker's Yeast Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Industrial Bread Capacity Expansion	XXX	XXX	XXX
Instant Dry Yeast Adoption	XXX	XXX	XXX
Foodservice Pizza and Bun Demand	XXX	XXX	XXX
Artisan Bread Premiumization	XXX	XXX	XXX
Bakery Automation and Process Control	XXX	XXX	XXX
Modern Retail and E-commerce Penetration	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Molasses and Energy Cost Volatility	XXX	XXX	XXX
Fermentation Effluent Compliance	XXX	XXX	XXX
Alternative Leavening Systems	XXX	XXX	XXX
Fresh Yeast Distribution Constraints	XXX	XXX	XXX

Source: XXX

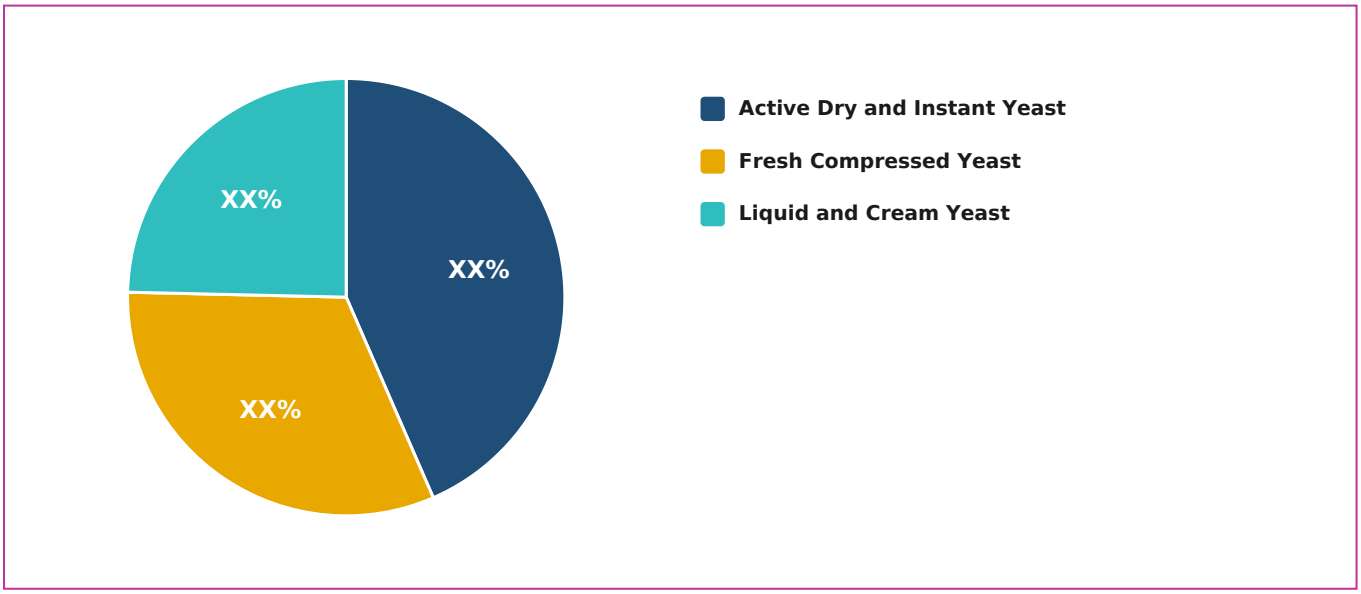
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Baker's Yeast Market Segmentation Analysis by Form, Application and Customer

By Product Form

Dry yeast leads because its storage stability and direct flour incorporation reduce cold-chain and labor requirements. Fresh compressed yeast remains entrenched among high-throughput European and Latin American bakeries that value rapid activity and frequent delivery. Liquid and cream yeast grows fastest in integrated industrial facilities using automated dosing systems.

Value share by product Form, 2025



Source: XXX

Value by product Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Active Dry and Instant Yeast	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fresh Compressed Yeast	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Liquid and Cream Yeast	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

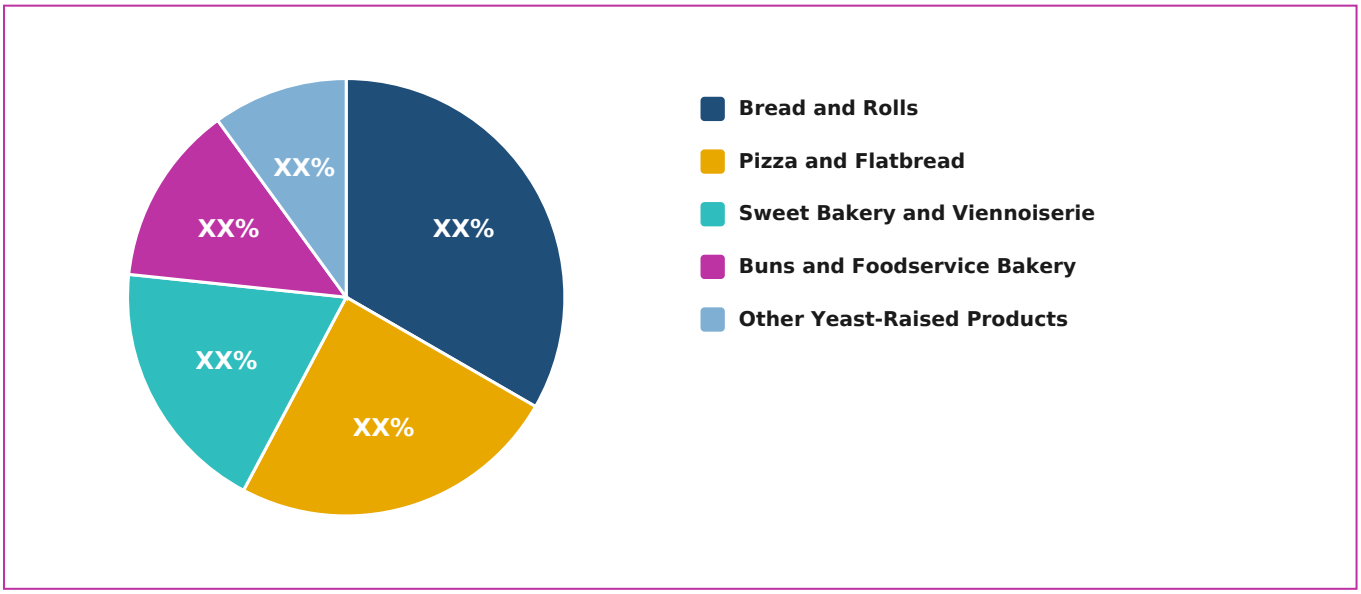
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By Application

Bread and rolls dominate because yeast-leavened staple products provide large, recurring industrial and artisan volumes. Pizza and flatbread demand is rising with foodservice-chain expansion, delivery formats and refrigerated dough. Sweet goods support premium osmotolerant formulations designed to perform in dough with high sugar and fat content.

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Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Bread and Rolls	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pizza and Flatbread	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sweet Bakery and Viennoiserie	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Buns and Foodservice Bakery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Yeast-Raised Products	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Customer Type

Industrial bakeries lead value consumption through continuous bread, bun and frozen-dough lines. Artisan and craft bakeries remain a substantial channel and increasingly purchase specialized products supported by recipe and process advice. Household demand normalizes after its pandemic-era surge but continues to expand through modern retail and e-commerce in emerging markets.

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Value by customer Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Industrial Bakeries	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Artisan and Craft Bakeries	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice Operators	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Households	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Direct supply dominates large industrial accounts because customers require audits, application trials, traceability and production planning. Distributors provide the essential route to fragmented artisan and foodservice customers, particularly outside major cities. Retail and e-commerce grow fastest as compact instant-yeast packs reach home bakers and micro-bakeries.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bakery Ingredient Distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail and Wholesale	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
E-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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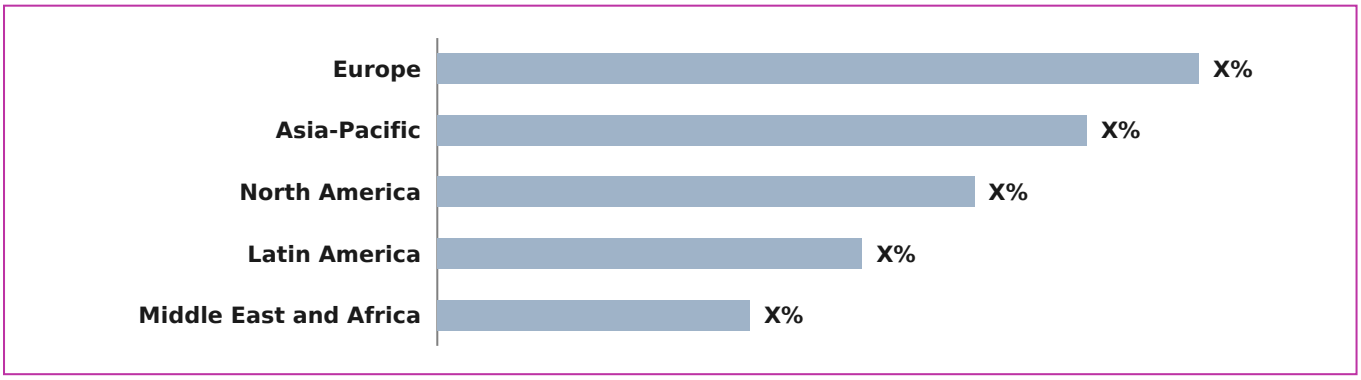
Baker's Yeast Market Regional Analysis and Country Outlook

Europe generated XX% of global baker's yeast revenue in 2025. France, Germany, Italy, the United Kingdom and Türkiye combine dense industrial bakery capacity with extensive artisan channels, supporting demand for both fresh compressed yeast and higher-value dry formulations. The region's mature bread volumes shift competitive emphasis toward recipe adaptation, frozen dough performance, clean-label positioning and fermentation efficiency.

Asia-Pacific is forecast to expand at a XX% CAGR and increase its global share from XX% in 2025 to XX% in 2031. Rising packaged-bread consumption, bakery-chain expansion and the conversion of small operators from fresh or locally propagated yeast to branded instant products drive growth. China is the region's largest market, while India, Indonesia and Vietnam deliver the strongest combination of bakery formalization, population growth and localized supply investment.

North America benefits from industrial bread, buns, pizza and frozen-dough production, with specification-driven contracts favoring technically capable suppliers. Latin America retains high fresh-yeast usage in Brazil, Mexico, Argentina and Colombia, while dry formats gain ground outside metropolitan distribution corridors. Middle East and Africa growth is led by Türkiye, Saudi Arabia, Egypt, Nigeria and South Africa, where import substitution and local fermentation capacity improve product availability.

Growth rate by region, 2025-2031



Source: XXX

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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

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Baker's Yeast Market Competitive Landscape and Company Share

The baker's yeast market is moderately concentrated: Lesaffre, AB Mauri, Angel Yeast, Lallemand and Pakmaya collectively generated XX% of 2025 revenue. Leadership is reinforced by proprietary strain libraries, molasses sourcing, fermentation scale, drying technology and application laboratories capable of adapting products to local flour and bakery processes. Regional specialists remain influential where fresh-yeast logistics and long-standing distributor relationships create defensible local positions.

Capacity is moving closer to high-growth consumption centers. Lesaffre and Citra Bonang formalized an Indonesian manufacturing investment in 2025, while Angel Yeast has expanded production across China and international locations. AB Mauri combines a global manufacturing footprint with local brands and technical centers, enabling it to serve industrial and craft bakers across more than 100 countries.

Strategic competition is shifting from commodity yeast toward performance systems for high-sugar dough, frozen applications, reduced proofing variability and cleaner ingredient declarations. Producers are also investing in wastewater treatment, heat recovery, renewable power and co-product valorization because fermentation-resource efficiency increasingly affects tender eligibility, operating cost and capacity approvals.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Lesaffre	XXX	XXX	XXX	XXX
AB Mauri	XXX	XXX	XXX	XXX
Angel Yeast Co., Ltd.	XXX	XXX	XXX	XXX
Lallemand Inc.	XXX	XXX	XXX	XXX
Pakmaya	XXX	XXX	XXX	XXX
Oriental Yeast Co., Ltd.	XXX	XXX	XXX	XXX
Kothari Fermentation and Biochem Ltd.	XXX	XXX	XXX	XXX
Levapan S.A.	XXX	XXX	XXX	XXX
Hagold Hefe GmbH	XXX	XXX	XXX	XXX
Asmussen GmbH	XXX	XXX	XXX	XXX

Source: XXX

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Baker's Yeast Market Forecast, Scenarios and Opportunities to 2031

The base-case forecast places the market at USD XXX billion in 2031, with volume growth supplemented by product mix, localized technical services and pricing required to recover fermentation inputs. Dry yeast will account for XX% of market value by 2031, while fresh yeast retains a durable role in high-throughput artisan and industrial clusters with reliable refrigerated distribution.

An accelerated industrialization scenario would lift the 2031 market to USD XXX billion as Southeast Asian, African and South Asian bakeries adopt standardized packaged bread and quick-service formats faster than expected. A cost-pressure scenario would limit the market to USD XXX billion if molasses, energy and financing costs delay new fermentation capacity and weaken price-sensitive bakery demand.

Winning suppliers will combine regional production, application expertise and measurable resource efficiency. The strongest opportunities lie in osmotolerant yeast, frozen-dough strains, compact retail packs, temperature-resilient dry products and technical-service platforms that help customers reduce proofing losses and improve line throughput.

Opportunities

- High-osmotolerance yeast for sweet and enriched dough
- Customized yeast for frozen and par-baked products
- Localized production in Southeast Asia and Sub-Saharan Africa
- Retail sachets and professional small packs in emerging cities
- Low-carbon fermentation and valorization of yeast co-products
- Vitamin-enriched and specialty-functional baker's yeast

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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