

# Global Dehydrated Vegetables 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

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

| Indicator | Value |
|---|---|
| Market size (2025) | USD 5.8 bn |
| Forecast (2031) | USD 8.9 bn |
| CAGR (2021-2031) | 7.4% |
| Study period | 2021-2031 |
| Largest region | Asia-Pacific · 39.2% |
| Fastest-growing region | Asia-Pacific · 8.5% |
| Market concentration | Moderate |
| Licence | Individual / Company |

The global dehydrated vegetables market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Demand is shifting from commodity preservation toward specification-led ingredients offering traceability, microbial control, consistent flavor and rapid rehydration for packaged foods, foodservice and nutrition products. Asia-Pacific accounted for XX% of 2025 revenue, supported by China's garlic-processing base, India's dehydrated onion exports and expanding regional convenience-food production. Freeze-dried vegetables will outpace the wider market as premium meal, snack, emergency-food and clean-label applications absorb additional capacity.

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# Executive summary

The global dehydrated vegetables market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Demand is shifting from commodity preservation toward specification-led ingredients offering traceability, microbial control, consistent flavor and rapid rehydration for packaged foods, foodservice and nutrition products. Asia-Pacific accounted for XX% of 2025 revenue, supported by China's garlic-processing base, India's dehydrated onion exports and expanding regional convenience-food production. Freeze-dried vegetables will outpace the wider market as premium meal, snack, emergency-food and clean-label applications absorb additional capacity.

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

## Key findings

- The market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Global revenue will increase at a XX% CAGR between 2025 and 2031.
- Asia-Pacific held XX% of 2025 market value and will record the fastest regional CAGR at XX%.
- Onion was the largest product category, accounting for XX% of 2025 revenue.
- Air drying retained XX% of market value, while freeze drying will advance at a XX% CAGR.
- Food manufacturing represented XX% of demand, led by soups, sauces, seasonings, noodles, savory snacks and prepared meals.
- Powders and granules captured XX% of market value because they provide standardized dosing and rapid flavor dispersion.
- FAO reported that global fruit and vegetable production reached XXX tonnes in 2023, expanding the agricultural base available to fresh and processed channels.

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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 Dehydrated Vegetables Market Trends and Growth Drivers

Dehydrated vegetables sit at the intersection of agricultural processing, flavor systems and supply-chain risk management. Buyers are paying for controlled solids, rehydration, cut size, color, microbial status and origin consistency as much as for the vegetable itself, which is shifting value toward integrated processors with farm-level visibility.

The demand case is strengthened by prepared-food growth and the economics of removing water before transport and storage. A manufacturer can hold ambient inventory, reduce trimming losses and dose a standardized ingredient, while a foodservice operator can reduce preparation labor and refrigerated-space requirements.

Supply remains crop-dependent and regionally concentrated. Water regulation in the western United States, weather variability in India and China, residue controls in Europe and energy-intensive drying create recurring volatility, making diversified origins and validated food-safety systems central to competitive advantage.

## Growth drivers

### Convenience-food manufacturing scales demand

Instant noodles, dry soups, sauces, meal kits and frozen prepared foods use dehydrated vegetables to simplify handling and stabilize formulation costs. High-throughput manufacturers favor ingredients that eliminate washing, trimming and cold-chain requirements while delivering repeatable solids content.

### Clean-label formulation accelerates adoption

Vegetable powders, toasted onion, garlic and tomato increasingly deliver flavor, color and visual identity without synthetic-sounding additives. The effect is strongest in savory snacks, sauces, plant-based foods and premium ready meals, where recognizable ingredient declarations support pricing and brand positioning.

### Shelf-life and waste economics strengthen substitution

Removing water lowers spoilage exposure, reduces refrigerated storage and allows processors to purchase standardized ingredients throughout the year. Dehydrated formats also improve yield control because manufacturers dose usable solids instead of absorbing trimming and moisture variability from fresh vegetables.

### Freeze-dried premium applications expand

Freeze drying preserves shape, color, porosity and rapid rehydration, supporting premium soups, outdoor meals, emergency foods and nutrition products. Capacity additions and better line utilization are gradually improving economics, broadening adoption beyond specialized military and expedition uses.

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### Foodservice centralization lifts ingredient throughput

Restaurant groups, institutional kitchens and commissaries are standardizing recipes across larger networks. Dehydrated vegetables reduce preparation labor and enable centralized dry inventory, making them particularly attractive where kitchen staffing and cold-storage capacity are constrained.

### Traceable supply wins regulated applications

Processors with contracted farms, residue-monitoring programs and validated kill steps are gaining preferred-supplier status among multinational food companies. Traceability supports faster root-cause analysis and allows buyers to consolidate spending with suppliers able to meet multiple national specifications.

## Restraints

### Energy and processing costs pressure margins

Thermal dehydration requires sustained heat, airflow and material handling, while freeze drying adds refrigeration and vacuum demand. Utility volatility is therefore transmitted quickly into conversion costs, especially for processors operating older batch equipment or serving price-sensitive commodity contracts.

### Climate and water risks constrain crops

Onion, garlic, tomato and leafy-vegetable dehydration depends on concentrated growing areas with predictable solids, color and harvest timing. Drought, groundwater restrictions, excessive rain and crop disease can simultaneously lower recoverable yield and increase raw-material prices.

### Residue and microbial specifications raise barriers

Drying concentrates certain residues, while low-moisture ingredients can still carry persistent pathogens if preventive controls are inadequate. Export-oriented suppliers must fund farm audits, analytical testing, steam or irradiation treatments and segregated handling to satisfy customer and regulatory limits.

### Fragmented supply intensifies price competition

Numerous regional processors compete in conventional air-dried products, particularly onion, garlic and carrot. This limits pricing power for undifferentiated grades and can delay recovery of investments in automation, emissions control and food-safety systems.

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# Dehydrated Vegetables Market Driver and Restraint Impact on the Forecast

### Drivers — impact on forecast

| Driver | Impact on CAGR | Geography | Horizon |
|---|---|---|---|
| Convenience-food manufacturing scales demand | XXX | XXX | XXX |
| Clean-label formulation accelerates adoption | XXX | XXX | XXX |
| Shelf-life and waste economics strengthen substitution | XXX | XXX | XXX |
| Freeze-dried premium applications expand | XXX | XXX | XXX |
| Foodservice centralization lifts ingredient throughput | XXX | XXX | XXX |
| Traceable supply wins regulated applications | XXX | XXX | XXX |

*Source: XXX*

### Restraints — impact on forecast

| Restraint | Impact on CAGR | Geography | Horizon |
|---|---|---|---|
| Energy and processing costs pressure margins | XXX | XXX | XXX |
| Climate and water risks constrain crops | XXX | XXX | XXX |
| Residue and microbial specifications raise barriers | XXX | XXX | XXX |
| Fragmented supply intensifies price competition | XXX | XXX | XXX |

*Source: XXX*

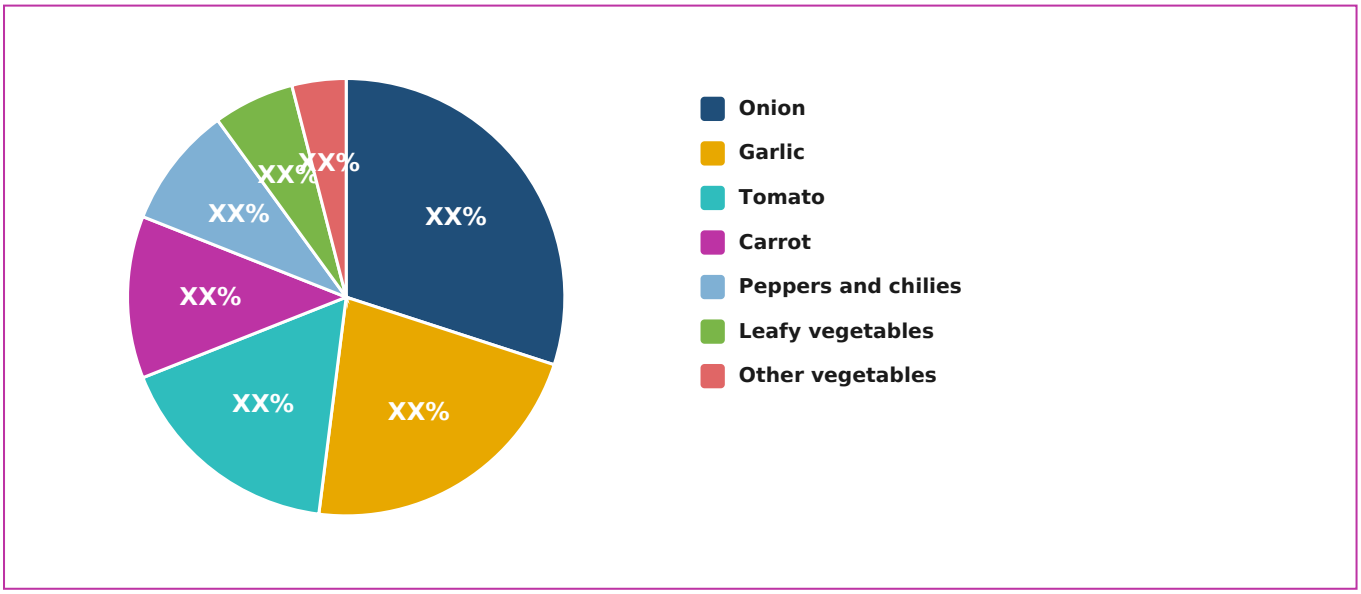
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# Dehydrated Vegetables Market Segmentation by Product, Technology, Form and Application

## By Product Type

Onion and garlic dominate because they provide foundational flavor across seasonings, sauces, soups, snacks and meat products and are supported by specialized processing clusters. Tomato follows as a major source of color, acidity and savory depth. Peppers and chilies will grow fastest as manufacturers pursue bolder regional flavor profiles and natural color.

**Value share by product Type, 2025**




*Source: XXX*

**Value by product Type, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Onion | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Garlic | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Tomato | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Carrot | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Peppers and chilies | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Leafy vegetables | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Other vegetables | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

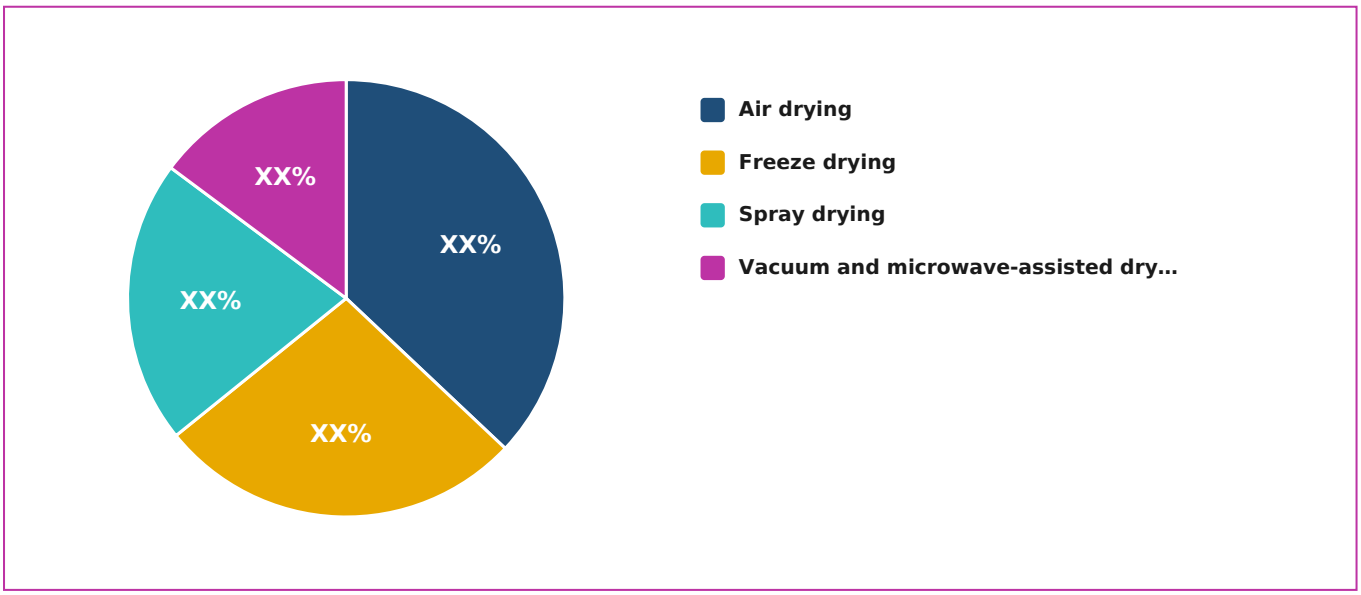
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## By Drying Technology

Air drying remains the cost and scale benchmark for onion, garlic, carrot and other industrial ingredients. Freeze drying commands higher pricing where shape, color, porosity and rapid rehydration matter. Vacuum and microwave-assisted systems are gaining ground where processors seek shorter cycles, improved quality retention and lower heat exposure.

**Value share by drying Technology, 2025**




*Source: XXX*

**Value by drying Technology, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Air drying | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Freeze drying | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Spray drying | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Vacuum and microwave-assisted drying | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Form

Powders and granules lead because they are easy to dose, blend and disperse in dry formulations. Flakes and pieces deliver visible vegetable identity and differentiated texture in soups, noodles and ready meals. Custom blends are a smaller but strategically attractive segment because they combine formulation support with higher switching costs.

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**Value by form, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Powders and granules | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Flakes | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Pieces, dices and slices | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Whole vegetables | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Custom vegetable blends | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Application

Food manufacturing is the core demand pool because dehydrated vegetables provide repeatable flavor, solids and visual inclusions at industrial scale. Foodservice demand is expanding through commissaries, seasoning systems and labor-saving formats. Specialty nutrition and pet food are growing faster as formulators use vegetable powders for recognizable ingredients, color and nutrient positioning.

**Value by application, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Food manufacturing | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Foodservice and institutional | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Retail and household | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Pet food, nutrition and other specialty uses | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Sales Channel

Large manufacturers buy directly under annual or crop-linked contracts covering microbiology, mesh size, color, origin and rehydration performance. Ingredient distributors remain important for fragmented food manufacturers and regional foodservice accounts. Retail and e-commerce are smaller in value but provide attractive margins for emergency foods, pantry products and specialty freeze-dried vegetables.

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**Value by sales Channel, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Direct business-to-business | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Ingredient distributors | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Retail and e-commerce | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

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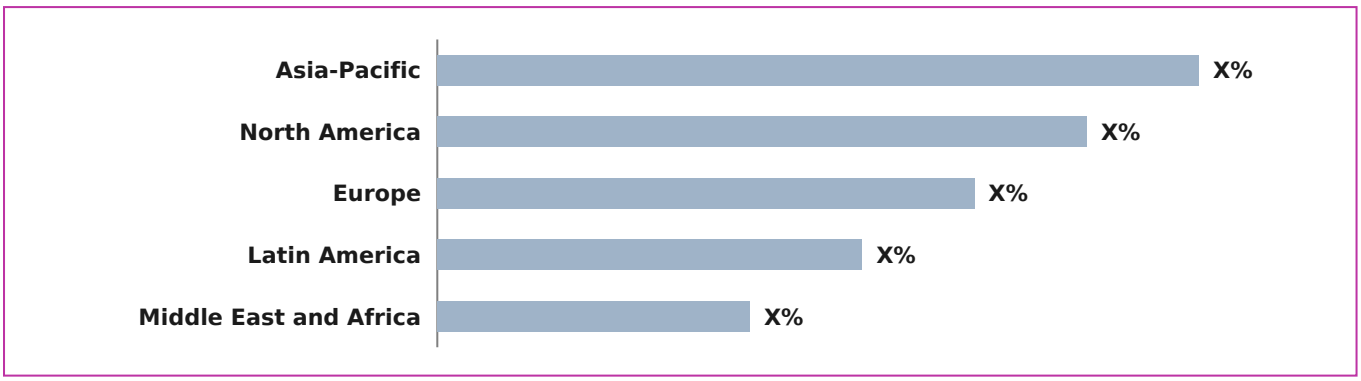
# Dehydrated Vegetables Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global revenue in 2025 and remains both the largest processing center and the fastest-growing consumption market. China anchors garlic, onion and mixed-vegetable processing, while India's Gujarat and Maharashtra clusters supply substantial dehydrated onion volumes. Rising packaged-food production in China, India, Indonesia and Vietnam is shifting part of regional capacity from export-led commodity output toward locally consumed, specification-rich ingredients.

North America accounted for XX% of market value, supported by large savory-food, foodservice, pet-food and emergency-meal industries. California and the western United States remain important for traceable onion, garlic, parsley and capsicum programs, but water availability, labor expense and groundwater regulation favor suppliers with proprietary seed, heat recovery and diversified growing regions. Freeze-dried products obtain their highest commercial penetration in the United States and Canada.

Europe held XX% of 2025 revenue and is distinguished by stringent residue specifications, retailer-led traceability requirements and strong demand for organic ingredients. Germany, the United Kingdom, France, the Netherlands and Poland lead consumption and distribution, while Latin America and the Middle East and Africa offer faster growth from a smaller base through instant foods, seasoning production, institutional catering and new vegetable-processing investment.

**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 |
|---|---|---|---|---|---|---|---|---|
| Asia-Pacific | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| North America | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Europe | 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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# Dehydrated Vegetables Market Competitive Landscape and Company Share

The market is moderately concentrated at the specification-intensive end and fragmented in conventional air-dried commodity grades. ofi, Sensient Natural Ingredients, Jain Farm Fresh Foods, Van Drunen Farms, BCFoods, Silva International and Döhler combine multi-origin procurement with technical sales, microbial-control capabilities and multinational customer approvals. Hundreds of smaller processors remain active in Chinese garlic, Indian onion and regional mixed vegetables.

Competition increasingly turns on control of agricultural supply rather than dryer ownership alone. Leading suppliers deploy proprietary or selected seed, grower programs, residue monitoring, optical sorting, validated pathogen-reduction steps and application laboratories. These capabilities protect customer retention and support premiums for low-microbial, organic, identity-preserved and custom-cut products.

Acquisition and capacity strategies are targeted rather than transformational. Sensient strengthened its capsicum platform through the acquisition of a New Mexico chili-processing facility, while Universal Corporation's Silva platform extends its exposure to specialty dehydrated vegetables, fruits and herbs. New investment is concentrating on freeze-drying, heat recovery, automation, water reuse and production close to contracted crops.

**Leading companies**

| Company | HQ | Est. revenue 2025 | Market share 2025 | YoY |
|---|---|---|---|---|
| ofi | XXX | XXX | XXX | XXX |
| Sensient Natural Ingredients | XXX | XXX | XXX | XXX |
| Jain Farm Fresh Foods | XXX | XXX | XXX | XXX |
| Van Drunen Farms | XXX | XXX | XXX | XXX |
| Mercer Foods | XXX | XXX | XXX | XXX |
| BCFoods | XXX | XXX | XXX | XXX |
| Silva International | XXX | XXX | XXX | XXX |
| European Freeze Dry | XXX | XXX | XXX | XXX |
| Döhler | XXX | XXX | XXX | XXX |
| Kerry Group | XXX | XXX | XXX | XXX |
| Kanegrade | XXX | XXX | XXX | XXX |
| Sleaford Quality Foods | XXX | XXX | XXX | XXX |

*Source: XXX*

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# Dehydrated Vegetables Market Forecast and Investment Opportunities

Market revenue will rise from USD XXX billion in 2025 to USD XXX billion in 2031. Volume growth will remain broad-based, but mix improvement from freeze-dried products, low-microbial specifications, organic sourcing and custom blends will account for a meaningful share of incremental value.

The central forecast assumes continued packaged-food and foodservice expansion, normalized freight markets and manageable crop-price volatility. A stronger clean-label conversion cycle and faster deployment of energy-efficient dryers would lift growth above the baseline; repeated drought, residue-related import interruptions or sustained energy inflation would slow capacity utilization and compress processor margins.

Winning suppliers will combine agricultural control, multiple origins, reliable kill-step validation and product-development support. Investment returns will be strongest in plants designed for rapid crop changeovers, heat recovery, automated sorting and differentiated formats rather than undifferentiated bulk powder alone.

## Opportunities

- Low-microbial vegetables for infant, medical and nutrition applications
- Freeze-dried inclusions for snacks and premium instant meals
- Upcycled vegetable powders produced from processing side streams
- Organic and regenerative-agriculture product lines
- Customized blends for foodservice chains and regional cuisines
- Distributed dehydration capacity near emerging-market production clusters

> 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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