



Global Dried Apricot 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 1.1 bn
Forecast (2031)	USD 1.7 bn
CAGR (2021-2031)	7.3%
Study period	2021-2031
Largest region	Europe · 34.8%
Fastest-growing region	Asia-Pacific · 8.6%
Market concentration	Low
Licence	Individual / Company

The global dried apricot market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Europe generated XX% of 2025 revenue, supported by established snacking demand, bakery applications and extensive Turkish supply relationships. Asia-Pacific will grow fastest at XX% annually as modern retail, online grocery and premium fruit-snack consumption broaden across China, India, Japan and Southeast Asia. Supply diversification, sulphite-free processing, organic certification and climate-resilient sourcing will determine competitive advantage through 2031.

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Executive summary

The global dried apricot market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Europe generated XX% of 2025 revenue, supported by established snacking demand, bakery applications and extensive Turkish supply relationships. Asia-Pacific will grow fastest at XX% annually as modern retail, online grocery and premium fruit-snack consumption broaden across China, India, Japan and Southeast Asia. Supply diversification, sulphite-free processing, organic certification and climate-resilient sourcing will determine competitive advantage through 2031.

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

Key findings

- The global market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Market volume will rise from XXX metric tons in 2025 to XXX metric tons in 2031.
- International Nut and Dried Fruit Council data placed 2024/25 world dried apricot production at XXX metric tons.
- Türkiye produced XXX metric tons in 2024/25, equivalent to XX% of global production reported by the International Nut and Dried Fruit Council.
- UN Comtrade data show that Türkiye exported XXX metric tons worth USD XXX million in 2024.
- Europe accounted for XX% of global market value in 2025, while Asia-Pacific will record the fastest regional CAGR at XX%.
- Whole dried apricots represented XX% of 2025 revenue, reflecting their dominant position in retail snacking and bulk distribution.
- Organic products represented XX% of 2025 value and will grow at XX% annually through 2031.

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 Dried Apricot Market Trends and Growth Drivers

The dried apricot economy sits at the intersection of concentrated agricultural supply and geographically diverse consumption. Türkiye remains the price-setting origin, while Iran, Uzbekistan, Tajikistan, Afghanistan, China, South Africa and the United States provide differentiated grades and a growing diversification pool.

Demand is moving beyond traditional bulk retail toward organic snacks, portion packs, cereals, nutrition bars and specification-led industrial ingredients. This shift raises the value of traceability, calibrated moisture, uniform cutting, residue control and dependable crop-year contracting.

Climate volatility is changing working-capital and procurement requirements. Following the 2025 Turkish frost, processors and importers are assigning greater strategic value to carryover inventory, licensed storage, alternative origins and orchard-level mitigation measures.

Growth drivers

Clean-label fruit snacking

Consumers are shifting snack expenditure toward recognizable ingredients, natural sweetness and portable formats. Dried apricots benefit from a strong nutritional profile, shelf stability and compatibility with no-added-sugar positioning, supporting distribution gains in supermarkets, pharmacies and workplace channels.

Bakery and cereal formulation demand

Industrial users are increasing dried-fruit inclusions in granola, breakfast cereals, bakery fillings, energy bars and confectionery. Diced apricot, paste and calibrated-moisture formats improve production efficiency and create recurring, specification-driven contracts for processors.

Organic and sulphite-free premiumization

Retailers are expanding organic and naturally dried assortments to capture higher-value health-conscious shoppers. The darker colour and shorter shelf-life of untreated fruit are increasingly accepted when supported by transparent origin, organic certification and resealable packaging.

Asia-Pacific retail expansion

Urban incomes, online grocery platforms and modern snack merchandising are increasing product availability across China, India and Southeast Asia. Imported premium fruit, gifting packs and local marketplace brands are accelerating category trial beyond traditional ingredient use.

E-commerce route-to-market

Digital channels allow processors and specialist brands to sell origin-specific grades, organic products and larger value packs without relying solely on national grocery listings. Reviews, subscriptions and targeted health messaging improve repeat purchase and reduce barriers for emerging brands.

Processing and storage modernization

Optical sorting, controlled drying, moisture calibration and licensed warehousing reduce defects and extend marketability across the crop year. These investments improve export consistency and enable suppliers to meet tighter industrial specifications.

Restraints

Concentrated climate exposure

Global supply remains heavily exposed to frost, hail and drought in Türkiye's Malatya-Elazığ production corridor. The April 2025 frost demonstrated how a single regional event can remove most new-crop availability, raise prices and force buyers to draw down inventories.

Raw-material price volatility

Harvest variability and limited substitution between preferred sizes, colours and origins transmit quickly into export prices. Smaller packers and private-label suppliers face margin compression where retail contracts do not permit timely price resets.

Sulphite and importer compliance

Suppliers must control treatment levels, document ingredients and satisfy importer verification procedures across major destination markets. Testing failures or undeclared sulphites can trigger recalls, delisting and higher audit costs throughout the supply chain.

Substitution by competing dried fruits

Raisins, dates, prunes and sweetened cranberries often offer greater year-round availability or lower formulation costs. Buyers can reduce apricot inclusion when price premiums widen, particularly in mixed-fruit snacks and value-tier bakery products.

Dried Apricot Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Clean-label fruit snacking	XXX	XXX	XXX
Bakery and cereal formulation demand	XXX	XXX	XXX
Organic and sulphite-free premiumization	XXX	XXX	XXX
Asia-Pacific retail expansion	XXX	XXX	XXX
E-commerce route-to-market	XXX	XXX	XXX
Processing and storage modernization	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Concentrated climate exposure	XXX	XXX	XXX
Raw-material price volatility	XXX	XXX	XXX
Sulphite and importer compliance	XXX	XXX	XXX
Substitution by competing dried fruits	XXX	XXX	XXX

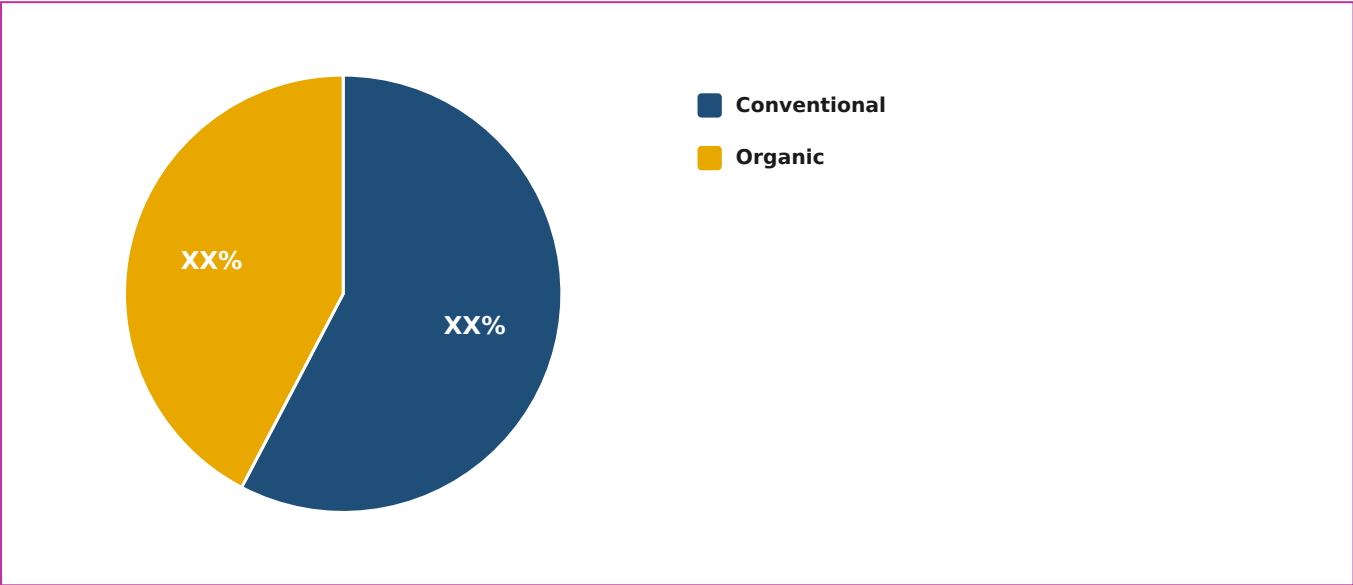
Source: XXX

Dried Apricot Market Segmentation Analysis

By Nature

Conventional fruit retains the broadest availability and supports mainstream retail, foodservice and cost-sensitive industrial applications. Organic supply commands a significant premium because certified orchard area, segregation and compliant processing remain limited. Organic growth will be strongest in Germany, France, the United Kingdom, the United States and specialist online channels.

Value share by nature, 2025



Source: XXX

Value by nature, USD bn

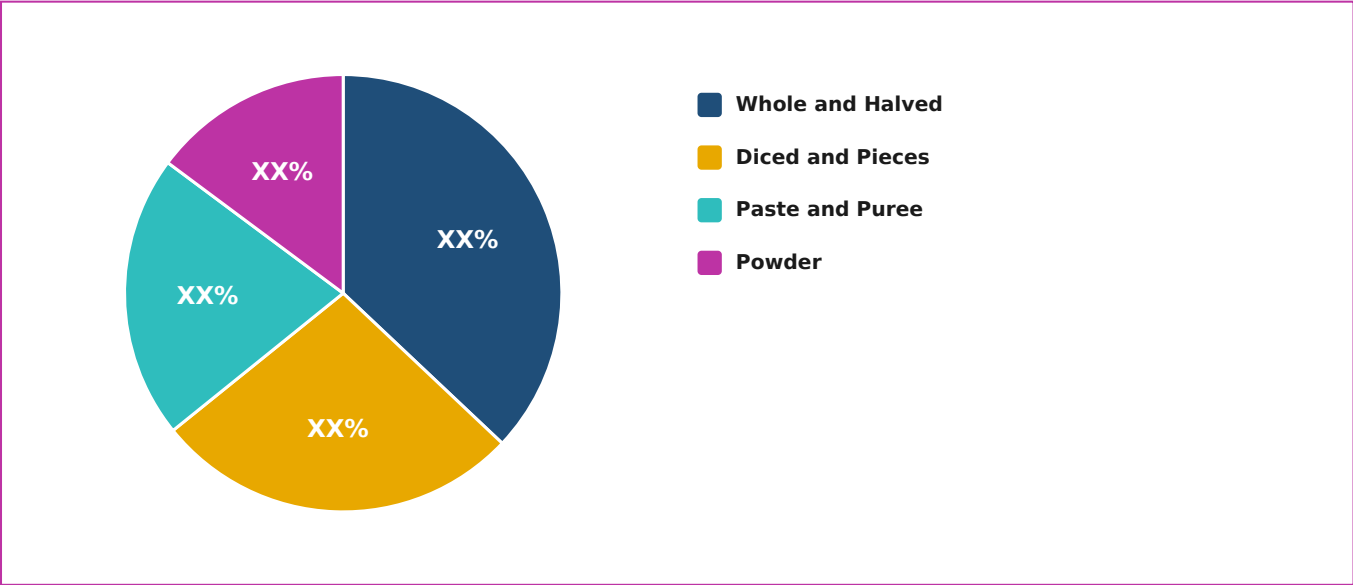
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Product Form

Whole and halved products dominate direct snacking, bulk bins and premium gifting because visual quality, size and colour support consumer differentiation. Diced fruit is gaining in bakery, granola and trail mixes, where uniform cut and calibrated moisture improve manufacturing performance. Paste, puree and powder will expand through fillings, bars, infant foods, sauces and natural sweetening applications.

Value share by product Form, 2025



Source: XXX

Value by product Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Whole and Halved	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Diced and Pieces	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Paste and Puree	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Powder	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Direct consumption remains the largest application because dried apricots require no preparation and fit portioned, resealable and bulk retail formats. Bakery and confectionery buyers value apricot for acidity, colour and texture in fillings, breads and chocolate-coated products. Cereals, nutrition bars and trail mixes are growing fastest as manufacturers increase recognizable fruit inclusions and reduce reliance on refined sweeteners.

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Snacking	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bakery and Confectionery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cereals, Bars and Trail Mixes	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dairy, Desserts and Other Processed Foods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Business-to-business trade leads because processors, repackers, bakeries and cereal manufacturers purchase container-scale volumes under crop-year contracts. Supermarkets and hypermarkets dominate consumer retail through private-label and branded pouches. Online marketplaces and direct-to-consumer sites will take share by supporting origin-specific, organic and bulk-value propositions.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Business-to-Business	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supermarkets and Hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialty and Health-Food Stores	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Convenience and Other Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

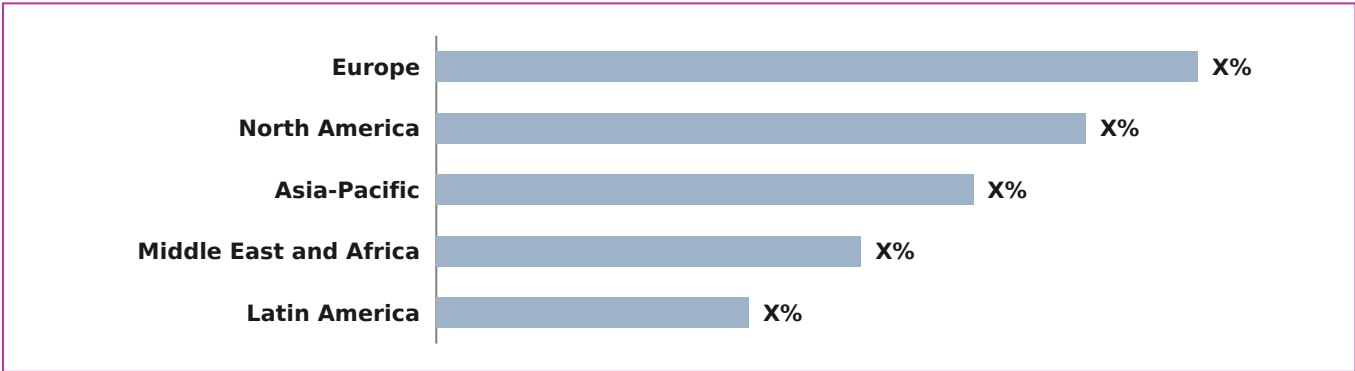
Dried Apricot Market Regional Analysis and Country Outlook

Europe generated XX% of global dried apricot revenue in 2025. Germany, France and the United Kingdom combine high per-capita dried-fruit consumption with mature organic retail, bakery and cereal industries, while the Netherlands functions as a major import and redistribution hub. European buyers maintain deep sourcing relationships with Turkish processors but are increasing origin diversification and inventory coverage following the 2025 crop disruption.

North America represented XX% of market value, led by the United States and its developed natural-food, club-store and industrial ingredient channels. California retains a differentiated position in premium halved fruit, although imported Turkish product dominates many retail and manufacturing applications. Sulphite disclosure, Foreign Supplier Verification Program compliance and residue testing materially influence supplier qualification.

Asia-Pacific will expand at an XX% CAGR through 2031, the fastest of any region. China combines domestic apricot production with growing premium imports, Japan rewards consistent colour and specification, and India is developing through online grocery, health-food retail and festive gifting. Central Asian producers will simultaneously increase their role as regional suppliers and alternative export origins.

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
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	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

Dried Apricot Market Competitive Landscape and Company Share

The dried apricot market is fragmented, with the ten largest suppliers accounting for XX% of 2025 revenue. Turkish processors compete through grower networks, sorting capacity, certifications and access to large export inventories, while multinational dried-fruit brands command shelf space through distribution, packaging and consumer recognition.

Leading strategies include organic conversion, sulphite-free lines, optical sorting, moisture-controlled packs and direct contracting with industrial customers. Mariani Packing, Sun-Maid, Sunsweet and Traina Foods hold strong North American channel positions, while Işık Tarım, Malatya Pazarı, Anatolia and Dağ Kuru Gıda anchor Turkish and European supply relationships.

Consolidation remains selective because orchard supply is dispersed and country-specific sourcing knowledge is commercially valuable. Investment is concentrating on backward integration, cold and licensed storage, food-safety laboratories, automated grading and acquisitions that secure agricultural supply rather than on large horizontal combinations.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Mariani Packing Company	XXX	XXX	XXX	XXX
Sun-Maid Growers of California	XXX	XXX	XXX	XXX
Sunsweet Growers	XXX	XXX	XXX	XXX
Traina Foods	XXX	XXX	XXX	XXX
Işık Tarım	XXX	XXX	XXX	XXX
Malatya Pazarı	XXX	XXX	XXX	XXX
Dağ Kuru Gıda	XXX	XXX	XXX	XXX
Bergin Fruit and Nut Company	XXX	XXX	XXX	XXX
ofi	XXX	XXX	XXX	XXX
Döhler	XXX	XXX	XXX	XXX

Source: XXX

Dried Apricot Market Forecast and Commercial Opportunities

The market will add USD XXX million between 2025 and 2031. Baseline growth combines a XX% annual increase in volume with stronger price and mix realization from organic certification, small-format packaging, industrial specifications and structurally higher climate-risk costs.

Near-term performance will be shaped by inventory management after the 2025 Turkish frost. Buyers with carryover stock, diversified origins and flexible formulations will protect service levels, while spot-market participants face elevated prices and reduced access to preferred sizes and bright-coloured sulphured fruit.

By 2031, winning suppliers will pair orchard-level traceability with automated sorting, verified sulphite control and multiple product formats. The strongest commercial opportunities will be organic whole fruit, diced inclusions for bars and cereals, online premium packs and Central Asian supply programmes capable of meeting European and North American compliance standards.

Opportunities

- Multi-origin sourcing from Central Asia, China and Afghanistan
- Organic, unsulphured and no-added-sugar product lines
- Diced, paste and powder formats for industrial formulation
- Small-format packs for convenience retail and portion control
- Premium gifting and e-commerce assortments in Asia and the Gulf
- Regenerative orchard programmes and frost-mitigation investment

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