



Global Freeze-Dried Berries 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 (2024)	USD 1.8 bn
Forecast (2031)	USD 3.1 bn
CAGR (2021-2031)	8.1%
Study period	2021-2031
Largest region	North America · 34.2%
Fastest-growing region	Asia-Pacific · 10.2%
Market concentration	Moderate
Licence	Individual / Company

The global freeze-dried berries market reached USD XXX billion in 2024 and is forecast to attain USD XXX billion by 2031, expanding at an XX% CAGR. Demand is moving beyond breakfast cereals into clean-label snacks, nutrition products, confectionery, bakery inclusions and premium pet nutrition. North America leads with XX% of 2024 revenue, while Asia-Pacific is the fastest-growing region at a XX% CAGR. Supply security, microbial controls, energy efficiency and access to berry-growing regions are becoming decisive sources of competitive advantage.

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Executive summary

The global freeze-dried berries market reached USD XXX billion in 2024 and is forecast to attain USD XXX billion by 2031, expanding at an XX% CAGR. Demand is moving beyond breakfast cereals into clean-label snacks, nutrition products, confectionery, bakery inclusions and premium pet nutrition. North America leads with XX% of 2024 revenue, while Asia-Pacific is the fastest-growing region at a XX% CAGR. Supply security, microbial controls, energy efficiency and access to berry-growing regions are becoming decisive sources of competitive advantage.

Indicator	Value
Market size 2024	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global market revenue reached USD XXX billion in 2024 and will rise to USD XXX billion by 2031.
- Strawberries represented XX% of 2024 market value, supported by broad consumer recognition and extensive use in cereals, snacks and confectionery.
- Powders and granules generated XX% of revenue in 2024, while whole berries and slices will post the fastest form-level CAGR at XX%.
- Food and beverage manufacturing accounted for XX% of 2024 demand, led by cereals, bakery, confectionery and dairy applications.
- North America held XX% of global revenue in 2024; Asia-Pacific will expand at a XX% CAGR through 2031.
- USDA reported record US cultivated blueberry production of XXX pounds in 2024, valued at USD XXX billion.
- USDA reported that approximately XX% of US cultivated blueberries entered the fresh market in 2024, leaving a substantial processing stream available to freezing and value-added preservation.
- Mexico's combined berry exports are forecast by USDA Foreign Agricultural Service at XXX metric tons in 2025, strengthening North America's year-round raw-material base.

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 Freeze-Dried Berries Market Trends and Growth

Drivers

Freeze-dried berries occupy a high-value intersection between agricultural processing, clean-label formulation and premium convenience. Their low water activity, concentrated flavor and visual identity allow manufacturers to add recognizable fruit without the cold-chain requirements or moisture migration associated with fresh and frozen berries.

The market's growth is commercially attractive but operationally demanding. Berry procurement is seasonal, fragile fruit creates yield-loss risk, and long vacuum cycles expose producers to energy costs; consequently, margins depend on crop contracting, loading discipline, product mix and chamber utilization as much as headline selling prices.

Demand is becoming more specification-driven as multinational customers require origin traceability, microbiological validation, controlled moisture, particle-size consistency and organic options. These requirements favor scaled processors with laboratories and multiple production locations, while creating defensible niches for specialists with direct grower relationships.

Growth drivers

Clean-label reformulation accelerates berry inclusion

Food manufacturers are replacing synthetic colors, flavors and multi-ingredient fruit preparations with recognizable berry powders and pieces. Freeze-dried berries provide concentrated sensory impact at low inclusion rates, allowing bakery, cereal, dairy and confectionery developers to simplify labels while preserving premium positioning.

Premium fruit snacking broadens retail demand

Single-ingredient berry snacks align portability, long shelf life and a crisp texture with demand for minimally processed foods. Expansion through warehouse clubs, natural-food retailers, drugstores and e-commerce is increasing household trial and moving the category beyond outdoor and emergency-food channels.

Natural color and flavor systems gain share

Berry powders deliver color, acidity and flavor in dry mixes without introducing substantial free water. Their technical functionality is especially valuable in chocolate, fillings, instant beverages, frosting and nutrition bars, where conventional purees can shorten shelf life or disrupt texture.

Functional nutrition creates premium applications

Sports-nutrition, wellness and meal-replacement brands are incorporating blueberry, cranberry, bilberry and mixed-berry powders into products positioned around fruit content and antioxidant-rich ingredients. These applications tolerate higher ingredient prices and reward standardized particle size, color and

microbiological specifications.

Modern retail expands across Asia-Pacific

Premium supermarkets, convenience chains and online marketplaces are introducing imported and locally packed freeze-dried fruit snacks to urban consumers. Product discovery through social commerce and the spread of yogurt, granola and home-baking occasions support double-digit regional growth.

Pet nutrition adds an industrial demand stream

Premium pet-food brands use freeze-dried berry powders and pieces in toppers, treats and complete diets to support whole-food ingredient positioning. Contract processors can use shared procurement, milling and packing infrastructure while applying dedicated food-safety and formulation controls.

Restraints

Energy-intensive processing constrains margins

Freezing, vacuum generation and long sublimation cycles make utility cost and chamber utilization central to profitability. Producers operating older equipment or short production runs face a structural cost disadvantage when energy prices rise.

Berry supply volatility disrupts utilization

Weather, labor availability and crop disease can sharply alter strawberry, raspberry and blueberry availability within a harvest season. Input shocks raise working-capital requirements and can leave processors balancing expensive spot purchases against underused drying capacity.

Microbiological controls raise compliance costs

Low water activity protects shelf stability but does not substitute for validated controls against pathogens introduced before or after drying. Recalls can affect retailer confidence across the category, increasing environmental monitoring, supplier approval and finished-product testing requirements.

Premium pricing limits mass-market conversion

Freeze-dried berries cost materially more per edible serving than fresh, frozen or conventionally dried alternatives. Inflation-sensitive consumers may reduce purchase frequency, while value-focused manufacturers can substitute air-dried fruit or flavor systems in less texture-sensitive applications.

Driver and Restraint Impact on the Freeze-Dried Berries Market Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Clean-label reformulation accelerates berry inclusion	XXX	XXX	XXX
Premium fruit snacking broadens retail demand	XXX	XXX	XXX
Natural color and flavor systems gain share	XXX	XXX	XXX
Functional nutrition creates premium applications	XXX	XXX	XXX
Modern retail expands across Asia-Pacific	XXX	XXX	XXX
Pet nutrition adds an industrial demand stream	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Energy-intensive processing constrains margins	XXX	XXX	XXX
Berry supply volatility disrupts utilization	XXX	XXX	XXX
Microbiological controls raise compliance costs	XXX	XXX	XXX
Premium pricing limits mass-market conversion	XXX	XXX	XXX

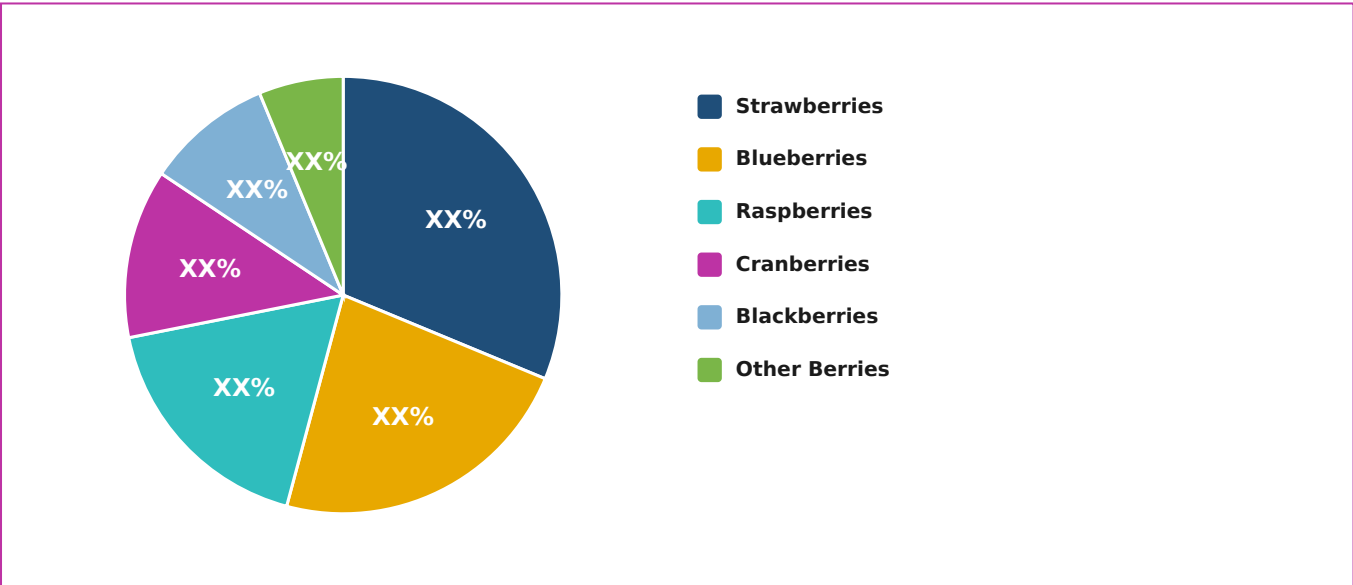
Source: XXX

Freeze-Dried Berries Market Segmentation Analysis

By Berry Type

Strawberry is the category's universal entry point because its color, sweetness and consumer familiarity translate across snacks, cereals, chocolate and bakery products. Blueberry gains from premium health positioning and an established frozen processing stream, while raspberry commands high unit prices in confectionery and foodservice. Mixed and less-common berries create differentiation but require tighter seasonal procurement.

Value share by berry Type, 2024



Source: XXX

Value by berry Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Strawberries	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Blueberries	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Raspberries	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cranberries	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Blackberries	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Berries	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Product Form

Powders and granules lead because industrial customers value controlled particle size, uniform dosing and concentrated natural color. Whole berries and slices capture higher retail and decorative-inclusion pricing, particularly in snacking, chocolate and premium cereals. Pieces balance visual identity with easier handling and lower breakage exposure.

Value by product Form, USD bn

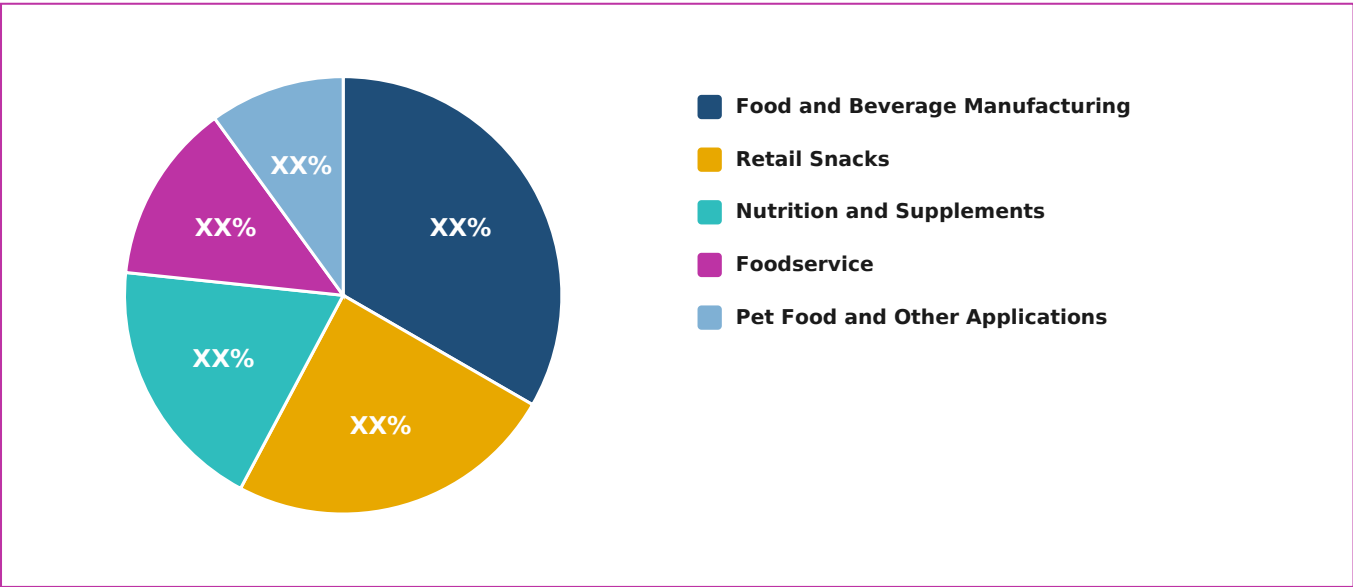
Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Powders and Granules	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pieces and Crumbles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Whole Berries and Slices	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Industrial food and beverage applications dominate through recurring, specification-driven purchases for cereal, bakery, confectionery, dairy and beverage products. Retail snacks grow faster as distribution broadens and brands add mixed berries, yogurt combinations and child-oriented formats. Nutrition and supplements favor powders, while foodservice demand centers on dessert garnish, bakery decoration and beverage preparation.

Value share by application, 2024



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Food and Beverage Manufacturing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail Snacks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Nutrition and Supplements	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pet Food and Other Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Direct contracts lead because large manufacturers require technical qualification, annual volume planning and tailored microbiological specifications. Distributors remain important for smaller manufacturers and fragmented export markets. E-commerce is expanding fastest as specialist brands, culinary users and small businesses purchase retail and bulk packs without traditional listing barriers.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Direct B2B	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Distributors and Wholesalers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Store-Based Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
E-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

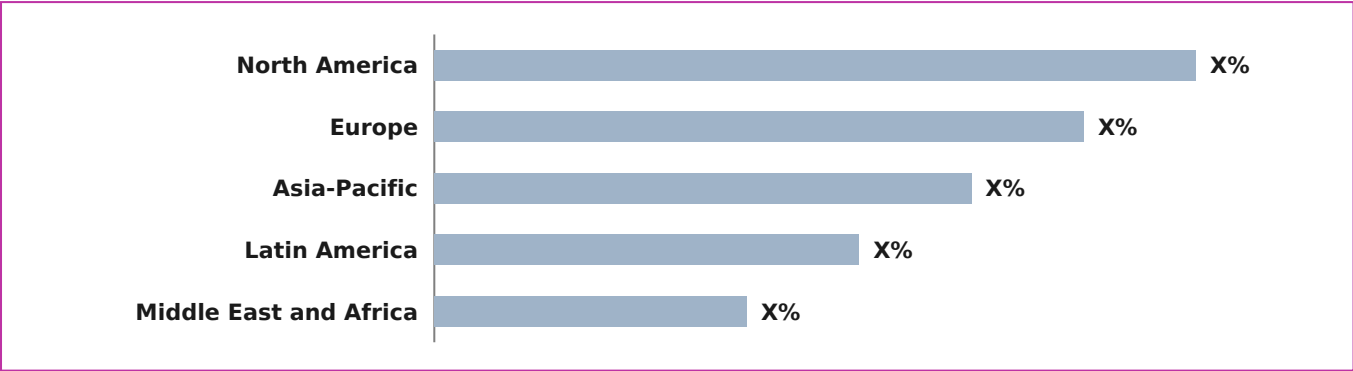
Freeze-Dried Berries Market Regional Analysis and Country Outlook

North America generated XX% of 2024 revenue, reflecting mature natural-food retail, warehouse-club distribution and substantial demand from cereal, snack, nutrition and pet-food manufacturers. The United States anchors the region through its broad blueberry and strawberry supply base, established contract-processing network and premium private-label ecosystem. Canada contributes a differentiated wild-blueberry proposition and an expanding base of clean-label snack brands.

Europe represented XX% of global revenue in 2024. Germany and the United Kingdom are the principal commercial hubs for ingredient formulation, retail snacking and multinational freeze-drying capacity, while Poland and the Nordic countries provide important berry-processing and wild-berry supply capabilities. Organic certification, contaminant compliance, recyclable packaging and traceable European sourcing increasingly shape purchasing decisions.

Asia-Pacific will lead growth at a XX% CAGR through 2031. China combines significant processing capacity with domestic demand growth, while Japan and South Korea support high-value applications in confectionery, cereals and convenient nutrition. Australia, India and Southeast Asia add a widening premium-retail opportunity, although imported equipment, energy costs and fragmented cold-chain procurement continue to influence producer economics.

Growth rate by region, 2024-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	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	2024	2031	Share 2024	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

Freeze-Dried Berries Market Competitive Landscape and Company Share

The market is moderately concentrated: the five largest suppliers controlled an estimated XX% of 2024 revenue, while numerous regional processors, ingredient distributors and consumer brands compete around them. Thrive Freeze Dry has built the broadest multinational platform through acquisitions, adding Freeze-Dry Foods in 2023 and Paradiesfrucht in 2024 to its North American production network. Chaucer Foods, European Freeze Dry, Van Drunen Farms, Mercer Foods and Döhler remain important competitors through technical application support, broad ingredient portfolios and established multinational accounts. Competition is shifting from basic drying capacity toward integrated grower access, validated food-safety systems, particle-size customization and application development. Producers with sites close to berry-growing regions reduce frozen-raw-material transport and can process seasonal surpluses rapidly. Retail specialists compete through organic certification, resealable moisture-barrier packaging, mixed-berry assortments and social-media-led product discovery.

M&A is strengthening global supply platforms while leaving room for origin-focused specialists. Future transactions will target processors with modern chambers, clean-room packing, organic certification, contracted crops and access to low-cost renewable power. Strategic investment is also moving toward automated loading, continuous monitoring, heat recovery and milling systems that improve yield consistency.

Leading companies

Company	HQ	Est. revenue 2024	Market share 2024	YoY
Thrive Freeze Dry	XXX	XXX	XXX	XXX
Chaucer Foods	XXX	XXX	XXX	XXX
European Freeze Dry	XXX	XXX	XXX	XXX
Van Drunen Farms	XXX	XXX	XXX	XXX
Mercer Foods	XXX	XXX	XXX	XXX
Döhler	XXX	XXX	XXX	XXX
Paradise Fruits Solutions	XXX	XXX	XXX	XXX
Freeze-Dry Foods	XXX	XXX	XXX	XXX
Brothers All Natural	XXX	XXX	XXX	XXX
Natierra	XXX	XXX	XXX	XXX

Source: XXX

Freeze-Dried Berries Market Forecast and Commercial Opportunities

The market will add approximately USD XXX billion between 2024 and 2031, with industrial ingredients contributing most absolute growth and retail snacks delivering the fastest route-to-market innovation. Strawberry will remain the largest berry type, but blueberry, raspberry and mixed-berry formulations will gain incremental shelf space through premium positioning and stronger usage in nutrition products.

The base-case forecast assumes continued clean-label reformulation, wider retail availability and gradual improvements in energy efficiency. An accelerated scenario emerges if chamber productivity and renewable-power procurement reduce conversion costs sufficiently to unlock mainstream snack price points; a constrained scenario centers on consecutive weak berry crops, elevated electricity prices and stricter retailer microbiological specifications.

Winning suppliers will combine multi-origin procurement with application laboratories, flexible cutting and milling, high-barrier packing and documented pathogen controls. The strongest commercial whitespace lies in Asia-Pacific consumer packs, globally standardized berry powders, premium pet nutrition, organic products and co-manufacturing for private-label portfolios.

Opportunities

- Organic and regenerative-sourcing product lines
- Mixed-berry powders for functional beverages and supplements
- Localized capacity in Latin America and Asia-Pacific
- Upcycling cosmetically imperfect berries into powders
- Low-moisture inclusions for chocolate, dairy and bakery products
- Contract manufacturing for retailer and digital-native brands

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