



Global IQF Fruit 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 8.7 bn
Forecast (2031)	USD 13.2 bn
CAGR (2021-2031)	7.2%
Study period	2021-2031
Largest region	Europe · 34.2%
Fastest-growing region	Asia-Pacific · 8.6%
Market concentration	Low
Licence	Individual / Company

The global IQF fruit market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Berries generated XX% of market value, supported by established smoothie, bakery, dairy and retail demand, while tropical fruit is the fastest-growing product group. Europe remained the largest regional market with a XX% share, whereas Asia-Pacific will record the fastest growth at XX% annually. Investment is concentrating on automated freezing lines, origin-based processing, pathogen controls, organic sourcing and formats tailored to convenient at-home consumption.

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Executive summary

The global IQF fruit market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Berries generated XX% of market value, supported by established smoothie, bakery, dairy and retail demand, while tropical fruit is the fastest-growing product group. Europe remained the largest regional market with a XX% share, whereas Asia-Pacific will record the fastest growth at XX% annually. Investment is concentrating on automated freezing lines, origin-based processing, pathogen controls, organic sourcing and formats tailored to convenient at-home consumption.

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

Key findings

- The global IQF fruit market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Market value will rise at a XX% CAGR between 2025 and 2031.
- Berries accounted for XX% of 2025 market value, led by strawberries, blueberries and raspberries.
- Europe held XX% of global market value in 2025, reflecting deep frozen-food penetration and a mature private-label supply base.
- Asia-Pacific will expand at an XX% CAGR through 2031 as cold-chain capacity, modern retail and fruit-based beverage manufacturing scale.
- Food manufacturing represented XX% of demand in 2025, making it the largest end-use category.
- FAO reported that global fruit and vegetable production reached XXX tonnes in 2023, providing a broad and geographically diverse agricultural feedstock base.
- FAO reported tropical-fruit trade of nearly XXX tonnes in 2023 and identified developing countries as the origin of XX% of tropical-fruit production.

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 IQF Fruit Market Trends and Growth Drivers

IQF fruit occupies a strategic point between agricultural seasonality and year-round food production. Rapid freezing stabilizes fruit close to harvest, while the free-flowing format gives manufacturers, foodservice operators and households control over dosing, labor and waste. Demand therefore responds to both consumer nutrition trends and operational economics.

The market's strongest growth mechanisms are fruit-forward beverages, frozen retail convenience, clean-label reformulation and cold-chain development. The supply response is increasingly international: berries move through established European and American networks, while mango, pineapple and other tropical crops attract processing investment closer to farms in Asia, Latin America and Africa.

Crop risk, power costs and microbiological controls shape profitability. The commercial divide will widen between suppliers that can document farm practices, trace lots, manage multiple origins and validate food-safety controls, and processors competing primarily on seasonal availability and price.

Growth drivers

Smoothie and functional beverage expansion

Smoothie chains, juice manufacturers and at-home blender users require fruit that is portionable, nutritionally consistent and available throughout the year. IQF formats reduce preparation time and allow manufacturers to formulate berry, tropical and mixed-fruit products without relying on seasonal fresh supply.

Year-round industrial ingredient demand

Dairy, bakery, confectionery and prepared-food manufacturers use IQF fruit to stabilize recipes, procurement schedules and finished-product yields. Contracted crop programmes and calibrated cuts improve line efficiency and make IQF fruit increasingly valuable in high-throughput plants.

Frozen retail convenience

Resealable pouches, single-serve smoothie packs and fruit blends position IQF fruit as a convenient breakfast, snacking and dessert ingredient. Retailers are broadening private-label ranges because frozen fruit supports portion control, reduces household spoilage and creates premium space within the freezer aisle.

Origin-based processing investment

New freezing capacity close to mango, pineapple, berry and tropical-fruit production shortens the interval between harvest and stabilization. The model improves recovery rates, lowers inbound logistics costs and enables processors in producing countries to export higher-value finished ingredients.

Clean-label product reformulation

Food and beverage companies are replacing artificial inclusions, colors and flavors with recognizable fruit ingredients. IQF pieces provide visual identity, texture and authentic flavor in bakery, yogurt, dessert and beverage applications while supporting shorter ingredient lists.

Cold-chain and modern retail development

Investment in freezer cabinets, refrigerated warehouses and temperature-controlled distribution is widening access to frozen fruit in major Asian, Middle Eastern and Latin American cities. Higher modern-grocery penetration also improves assortment visibility and supports premium imported and locally processed products.

Restraints

Climate-driven crop volatility

Heat, excessive rainfall, drought and irregular flowering create sharp swings in berry and orchard-fruit yields. Processors must carry more origin options and inventory, while poor crop years raise raw-material costs and limit the availability of preferred varieties and calibrated sizes.

Energy and refrigerated-logistics costs

IQF tunnels, cold stores and frozen transport require continuous power and temperature control. Electricity and logistics inflation disproportionately affect smaller processors and long-distance trade lanes, increasing the value of energy-efficient equipment and strategically located storage.

Ready-to-eat berry safety exposure

Frozen berries used in smoothies and other uncooked foods may reach consumers without a kill step, intensifying scrutiny of irrigation water, worker hygiene and viral contamination controls. Supplier approval, testing and validated preventive programmes increase operating requirements but reward processors with strong traceability.

Retailer and buyer purchasing power

Large retailers and multinational food manufacturers aggregate volumes through competitive tenders and tightly specified contracts. Suppliers lacking differentiated origins, certifications or service capabilities face price compression, especially in high-volume conventional strawberry and mixed-berry categories.

IQF Fruit Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Smoothie and functional beverage expansion	XXX	XXX	XXX
Year-round industrial ingredient demand	XXX	XXX	XXX
Frozen retail convenience	XXX	XXX	XXX
Origin-based processing investment	XXX	XXX	XXX
Clean-label product reformulation	XXX	XXX	XXX
Cold-chain and modern retail development	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Climate-driven crop volatility	XXX	XXX	XXX
Energy and refrigerated-logistics costs	XXX	XXX	XXX
Ready-to-eat berry safety exposure	XXX	XXX	XXX
Retailer and buyer purchasing power	XXX	XXX	XXX

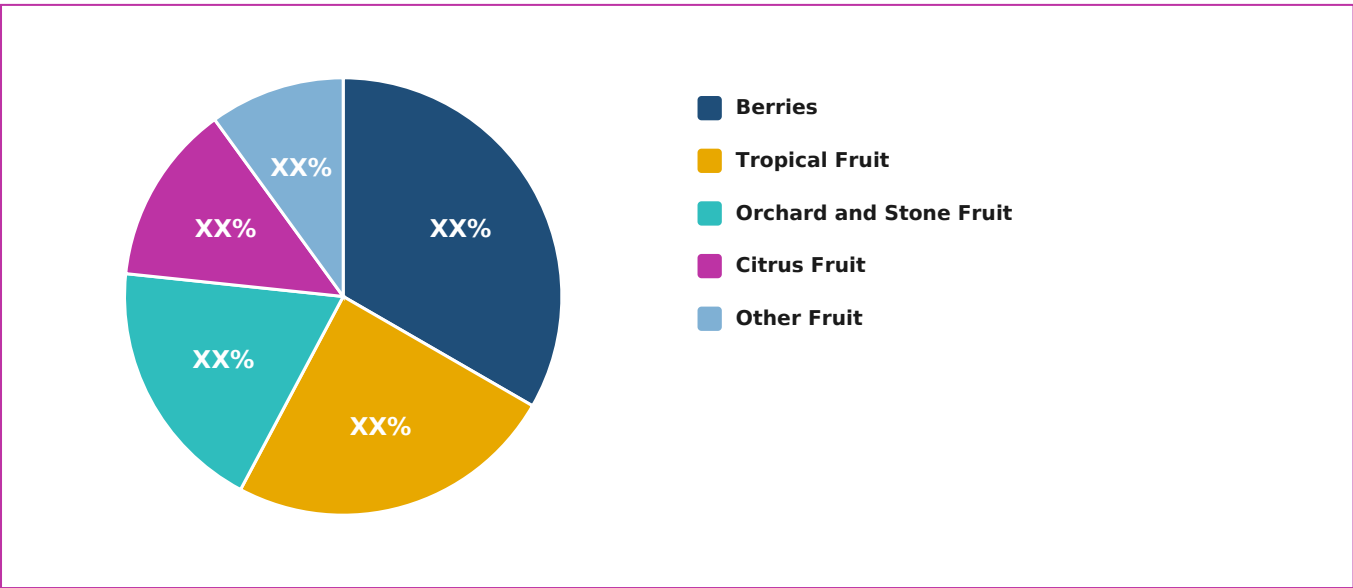
Source: XXX

IQF Fruit Market Segmentation by Product, Form, Nature and End Use

By Product Type

Berries dominate because strawberries, blueberries and raspberries are established ingredients in smoothies, yogurt, bakery and retail mixes. Tropical fruit is expanding faster as mango and pineapple become mainstream in beverages and desserts, while passion fruit, dragon fruit and papaya broaden premium assortments. Orchard and stone fruit retain strong industrial demand in bakery, preserves and dairy inclusions.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Berries	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Tropical Fruit	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Orchard and Stone Fruit	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Citrus Fruit	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Fruit	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Form

Cut fruit leads on value because calibrated pieces command a processing premium and integrate efficiently into bakery, dairy and beverage lines. Whole fruit remains essential for berries and premium retail packs. Blends are the fastest-growing format as retailers and foodservice operators use them to simplify recipes, differentiate flavor profiles and improve portion control.

Value by form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Whole Fruit	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Slices, Dices and Chunks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Crumbles and Small Pieces	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fruit Blends	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Nature

Conventional supply dominates high-volume industrial procurement because it offers broader origin coverage and lower delivered cost. Organic products carry greater value per tonne and are gaining space in premium retail, baby food and clean-label applications. Growth depends on certified farm availability, residue management and segregation throughout processing and storage.

Value by nature, USD bn

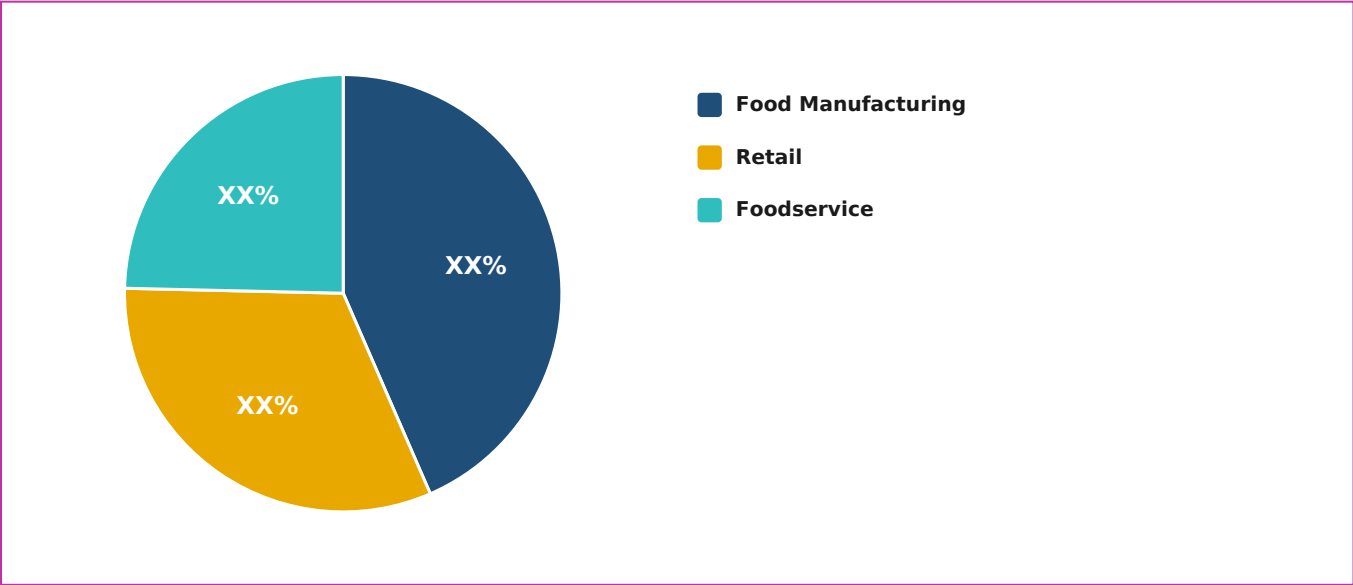
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End Use

Manufacturers consume the largest volume through bakery, dairy, beverages, desserts, baby food and prepared meals. Retail is growing faster as private-label pouches, smoothie kits and premium fruit blends expand the freezer set. Foodservice demand is supported by smoothie chains, hotels, cafés, institutional kitchens and dessert operators seeking consistent yield and minimal preparation.

Value share by end Use, 2025



Source: XXX

Value by end Use, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Food Manufacturing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging

Bulk bags, cartons and lined containers lead because industrial users purchase contracted volumes and meter fruit directly into production. Retail pouches gain value through resealability, graphics, premium blends and smaller pack sizes. Foodservice packs occupy the middle ground, balancing operational handling with portionability and freezer-space constraints.

Value by packaging, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Bulk Industrial Packs	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail Pouches and Cartons	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice Packs	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

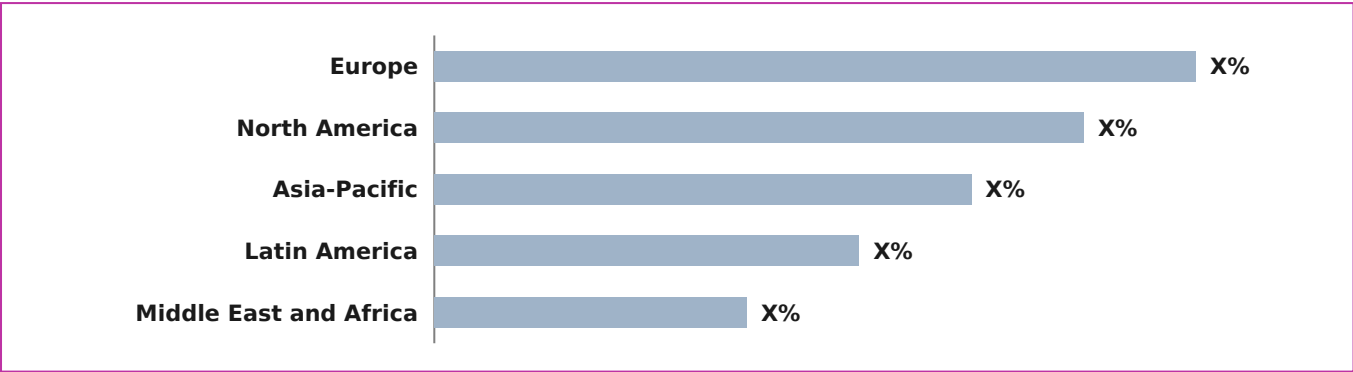
IQF Fruit Market Regional Analysis and Country Outlook

Europe generated XX% of global IQF fruit value in 2025. Germany, the United Kingdom, France, the Netherlands and Belgium anchor demand through mature frozen retail categories, industrial bakery and dairy production, and extensive private-label sourcing. European processors also act as import, blending, quality-control and redistribution hubs for berries from Eastern Europe and tropical fruit from Latin America, Africa and Asia.

North America represented XX% of market value, with the United States accounting for most regional consumption. Smoothies, foodservice beverage menus, club-store packs and clean-label bakery applications support demand, while regulatory attention to enteric viruses is raising the commercial value of audited farms, hygienic harvesting, environmental monitoring and validated processing controls.

Asia-Pacific will be the fastest-growing region at an XX% CAGR through 2031. China, India, Japan, South Korea and Australia combine expanding modern retail with growing yogurt, bakery, bubble-tea, dessert and beverage industries. Latin America and the Middle East and Africa remain smaller consumption markets but will become increasingly important processing bases for mango, pineapple, berries and other tropical fruit.

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
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

IQF Fruit Market Competitive Landscape and Company Share

The market is fragmented across multinational frozen-food groups, fruit specialists, farmer-linked processors and regional exporters. The five largest suppliers accounted for XX% of 2025 revenue, producing a Low concentration rating. Scale leaders compete through multi-origin procurement, broad crop portfolios, cold-storage networks, food-safety systems and long-term relationships with industrial and retail customers.

Ardo, Greenyard, AGRANA through Dirafrrost, Dole and Fresh Del Monte combine recognized commercial platforms with international sourcing or processing capabilities. Specialists including Wawona Frozen Foods, Milne Fruit Products, Nature's Touch, Crop's, Frutícola Olmué and Patagonia Foods hold strong positions in selected crops, origins or channels.

Capital allocation is shifting toward processing at origin, optical sorting, automated packing, renewable power and digital traceability. Consolidation will remain selective because agricultural access and local grower networks matter as much as plant scale; partnerships and contracted-supply arrangements will therefore accompany outright acquisitions.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Ardo	XXX	XXX	XXX	XXX
Greenyard	XXX	XXX	XXX	XXX
Dirafrrost FFI	XXX	XXX	XXX	XXX
Dole	XXX	XXX	XXX	XXX
Fresh Del Monte Produce	XXX	XXX	XXX	XXX
SunOpta	XXX	XXX	XXX	XXX
Wawona Frozen Foods	XXX	XXX	XXX	XXX
Nature's Touch Frozen Foods	XXX	XXX	XXX	XXX
Milne Fruit Products	XXX	XXX	XXX	XXX
Stahlbush Island Farms	XXX	XXX	XXX	XXX
Crop's	XXX	XXX	XXX	XXX
Frutícola Olmué	XXX	XXX	XXX	XXX

Source: XXX

Global IQF Fruit Market Forecast and Strategic Opportunities

By 2031, IQF fruit will be more deeply integrated into everyday breakfast, beverage, bakery and snack occasions. Market growth will come from a combination of volume expansion and premiumization, with tropical fruit, organic ranges, calibrated pieces and customer-specific blends outperforming undifferentiated bulk products.

The central scenario places 2031 market value at USD XXX billion. A stronger cold-chain investment cycle and faster adoption of fruit-forward convenience products would lift the market toward USD XXX billion, while prolonged crop inflation and weaker discretionary consumption would limit the outcome to USD XXX billion.

Winning suppliers will operate resilient multi-origin crop programmes while retaining processing proximity to farms. Traceable sourcing, rapid freezing after harvest, robust viral-risk controls, energy efficiency and application-development support will determine access to premium industrial and retail contracts.

Opportunities

- Tropical-fruit processing hubs near farms in Asia, Latin America and Africa
- Validated ready-to-eat berry safety programmes
- Premium organic, regenerative and fully traceable fruit ranges
- Customized smoothie blends and portion-controlled foodservice formats
- Upcycling visually imperfect fresh fruit into specification-grade IQF ingredients
- Automation, optical sorting and digital crop-to-lot traceability

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