

Global Processed And Frozen 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 80 bn
Forecast (2031)	USD 107.2 bn
CAGR (2021–2031)	5%
Study period	2021–2031
Largest region	Europe · 32%
Fastest-growing region	Asia-Pacific · 6.9%
Market concentration	Moderate
Licence	Individual / Company

The global processed and frozen vegetables market reaches USD XXX billion in 2025 and expands to USD XXX billion by 2031, advancing at a XX% CAGR. Frozen products account for XX% of market value, supported by frozen potato demand, portion-controlled foodservice formats and household demand for convenient vegetables. Europe holds the largest regional share at XX%, while Asia-Pacific records the fastest growth at XX%. The report examines how agricultural procurement, processing yields, cold-chain economics and retailer bargaining power shape revenue growth and competitive advantage across frozen, canned, dehydrated and pickled vegetables.

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Executive summary

The global processed and frozen vegetables market reaches USD XXX billion in 2025 and expands to USD XXX billion by 2031, advancing at a XX% CAGR. Frozen products account for XX% of market value, supported by frozen potato demand, portion-controlled foodservice formats and household demand for convenient vegetables. Europe holds the largest regional share at XX%, while Asia-Pacific records the fastest growth at XX%. The report examines how agricultural procurement, processing yields, cold-chain economics and retailer bargaining power shape revenue growth and competitive advantage across frozen, canned, dehydrated and pickled vegetables.

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

Key findings

- shev.io Research places the global market at USD XXX billion in 2025 and USD XXX billion in 2031, representing a XX% CAGR.
- Frozen vegetables and frozen potato products generate USD XXX billion in 2025, accounting for XX% of total market value.
- Canned and other ambient thermally preserved vegetables contribute XX% of market value, providing a substantial demand base outside the frozen supply chain.
- Europe leads with USD XXX billion in 2025 sales and a XX% regional share.
- Asia-Pacific accounts for XX% of base-year revenue and grows at XX% annually through 2031.
- Potatoes and other roots or tubers represent the largest vegetable group at XX% of market value.
- Household consumption accounts for XX% of processor sales by ultimate end use, followed by foodservice at XX%.
- Supermarkets, hypermarkets and discounters account for XX% of market value through their procurement 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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Processed And Frozen Vegetables Market Trends and Growth Drivers

Processed vegetables sit at the intersection of agricultural production and industrial food manufacturing. Their economics depend on the price and quality of harvested crops, the proportion converted into saleable output and the cost of preservation. A favorable retail demand environment cannot compensate indefinitely for poor crop recovery or underused processing assets. The report therefore connects consumer demand with agricultural procurement and plant-level operating requirements.

Preservation technology creates distinct commercial models. Frozen products require continuous temperature control and compete heavily on texture and cooking performance; canned products combine long shelf life with packaging and thermal-processing costs. Dehydrated vegetables prioritize ingredient functionality and freight efficiency, while pickled and fermented products depend more heavily on regional tastes and formulation. Comparing these categories requires a common revenue boundary and separate volume conventions.

Customer economics are equally important. Grocery buyers focus on affordability, availability and private-label execution, while professional kitchens prioritize preparation labor, usable yield and consistency. Industrial manufacturers place greater weight on specifications and qualification reliability. Successful suppliers align investment and innovation with these purchasing criteria rather than treating the market as a single undifferentiated convenience category.

Growth drivers

Convenience-led household vegetable demand

Frozen and ambient vegetables remove washing, trimming and much of the preparation effort associated with fresh produce. Resealable packs, steam-cook formats and recipe-specific mixtures improve portion control and make vegetables easier to incorporate into routine meals. Processors benefit most when convenience is delivered without sacrificing texture or raising the effective cost per serving.

Foodservice demand for consistent frozen potatoes

Restaurant chains and institutional kitchens value predictable cooking performance, product dimensions and availability across locations. Frozen potatoes and preprocessed vegetables reduce preparation labor and simplify procurement. Suppliers with application support, dependable delivery and suitable cooking specifications are positioned to secure recurring customer programmes.

Emerging-market cold-chain expansion

Refrigerated warehouses, modern grocery formats and temperature-controlled last-mile services extend the geographic reach of frozen vegetables. The strongest demand response occurs where distribution investment coincides with household freezer ownership and organized foodservice growth. Local processing can improve product availability and reduce exposure to import freight and currency movements.

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Private-label expansion in modern grocery

Retailers use private-label vegetables to strengthen price perception in frequently purchased categories. Scaled processors gain access to substantial recurring volumes when they meet specifications, service requirements and packaging deadlines. The opportunity favors flexible plants and disciplined customer costing because contract volume alone does not ensure attractive margins.

Standardized ingredients for food manufacturing

Manufacturers of sauces, soups, seasonings and complete meals require vegetables with consistent moisture, particle size, color and microbiological performance. Dehydrated ingredients, tomato products and individually quick-frozen vegetables address these specifications while simplifying inventory planning. Technical collaboration and agricultural traceability support supplier retention in qualification-intensive applications.

Portion control and lower preparation waste

Preserved vegetables allow households and professional kitchens to use quantities matched to demand while retaining the balance for later use. Their economic appeal strengthens when fresh-produce spoilage, preparation labor and seasonal price variation are considered together. Clear communication of usable yield and cost per serving can support category adoption.

Restraints

Crop and water availability constrain throughput

Heat, drought, excessive rainfall and changing pest pressure affect vegetable yields and the share of harvested crops meeting processing specifications. Plants designed around seasonal campaigns cannot always replace lost local supply economically. Procurement diversification, irrigation access and agronomic support therefore influence capacity utilization as directly as factory equipment.

Energy and packaging cost exposure

Freezing and refrigerated storage require sustained electricity expenditure, while canning and dehydration depend on thermal energy. Metal cans, glass jars, flexible films and corrugated packaging add separate cost exposures. Margin recovery depends on contract timing, plant efficiency and the ability to pass through costs before customer demand weakens.

Retail bargaining power compresses margins

Large grocery groups can compare branded and private-label offers and redirect contracts across qualified processors. Promotional funding, service penalties and packaging changes can offset apparent selling-price gains. Suppliers with limited differentiation or excessive reliance on a small customer base face the greatest pressure.

Food-safety and cross-border compliance costs

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Frozen vegetables require controls for environmental contamination and correct consumer preparation, while canned and pickled products require validated preservation processes. Residue limits, import controls, traceability and labeling obligations vary by destination. Export-oriented processors need strong quality systems and documentation to prevent rejected shipments and costly product withdrawals.

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Processed And Frozen Vegetables Market Driver and Restraint Impact

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Convenience-led household vegetable demand	XXX	XXX	XXX
Foodservice demand for consistent frozen potatoes	XXX	XXX	XXX
Emerging-market cold-chain expansion	XXX	XXX	XXX
Private-label expansion in modern grocery	XXX	XXX	XXX
Standardized ingredients for food manufacturing	XXX	XXX	XXX
Portion control and lower preparation waste	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Crop and water availability constrain throughput	XXX	XXX	XXX
Energy and packaging cost exposure	XXX	XXX	XXX
Retail bargaining power compresses margins	XXX	XXX	XXX
Food-safety and cross-border compliance costs	XXX	XXX	XXX

Source: XXX

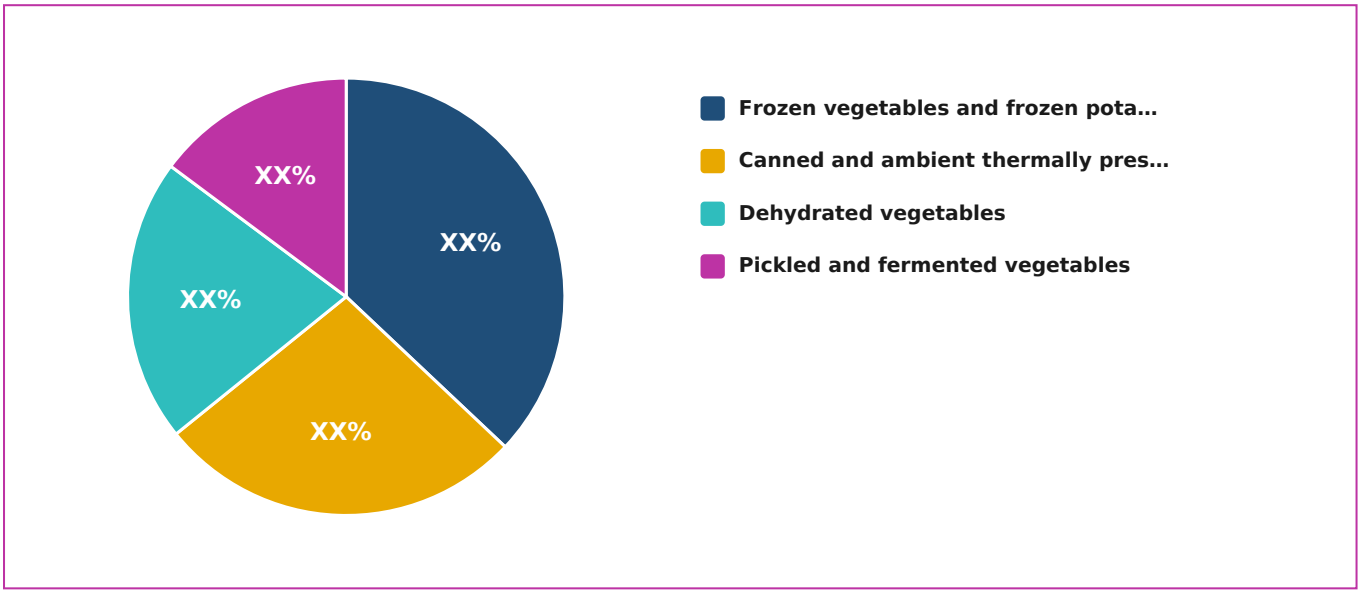
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Processed And Frozen Vegetables Market Segmentation by Preservation, Vegetable and Channel

By Preservation Type

Frozen products lead because they serve household, foodservice and industrial applications while offering standardized portions and year-round availability. Canned and ambient thermally preserved vegetables retain a substantial position through affordable storage and established pantry use. Dehydrated products serve ingredient-intensive applications, while pickled and fermented vegetables draw demand from regional cuisines and flavor-led consumption. Frozen is the fastest-growing preservation category, supported by foodservice and emerging-market cold-chain development.

Value share by preservation Type, 2025



Source: XXX

Value by preservation Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Frozen vegetables and frozen potato products	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Canned and ambient thermally preserved vegetables	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dehydrated vegetables	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pickled and fermented vegetables	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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By Vegetable Type

Potatoes and other roots or tubers lead because frozen fries and related formats are embedded in restaurant and household consumption. Tomatoes support a substantial ambient and industrial processing business, while peas, beans and sweetcorn benefit from broad culinary familiarity. Mixed vegetables offer convenient meal preparation and scope for regional recipe adaptation. Mixed vegetables are the fastest-growing group as processors expand application-specific combinations and preparation formats.

Value by vegetable Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Potatoes and other roots or tubers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Tomatoes	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Peas, green beans and other prepared pulses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sweetcorn	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Mixed vegetables	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Leafy and brassica vegetables	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other vegetables	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

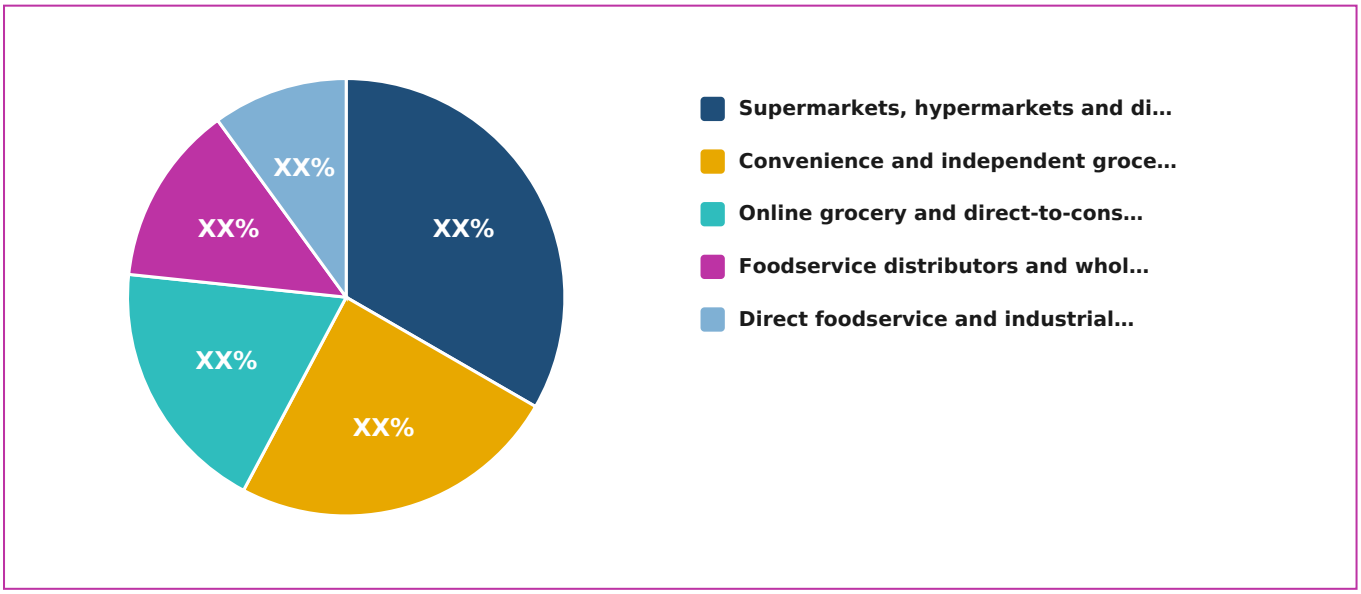
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By Distribution Channel

Large grocery operators lead through broad assortments, private-label programmes and frequent household purchasing. Foodservice distributors provide access to fragmented restaurant and institutional customers, while direct contracts are important for large chains and industrial manufacturers. Online grocery is the fastest-growing channel as retailer fulfillment and temperature-controlled delivery improve. Channel allocation follows the processor's route to the customer, with online grocery purchases separated from physical-store procurement to avoid overlap.

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Value share by distribution Channel, 2025



Source: XXX

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Supermarkets, hypermarkets and discounters	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Convenience and independent grocery stores	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online grocery and direct-to-consumer retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice distributors and wholesalers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Direct foodservice and industrial contracts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End Use

Households lead through regular purchases of frozen vegetables, canned pantry products and pickled vegetables. Foodservice demand is anchored by frozen potatoes and standardized preparation requirements across restaurants, catering and institutional kitchens. Industrial users purchase vegetable ingredients for products outside the report's market boundary. Foodservice is the fastest-growing end use as organized restaurant demand and labor-saving kitchen formats expand.

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Value by end Use, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Household consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial food manufacturing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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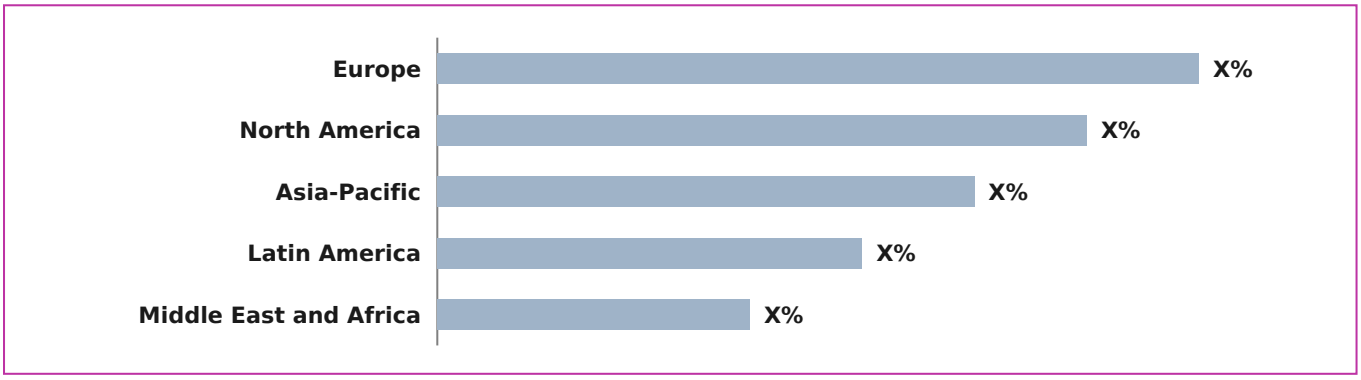
Processed And Frozen Vegetables Market Regional Analysis and Country Outlook

Europe holds XX% of global revenue, equivalent to USD XXX billion in 2025. The region combines substantial processing capacity with established household consumption, concentrated grocery procurement and a developed private-label sector. Belgium and the Netherlands are particularly important to frozen potato and vegetable supply, while France contributes a broad branded and industrial processing base. Germany and the United Kingdom remain significant destination markets. Agricultural water availability, energy procurement and the economics of retailer contracts are central to regional profitability.

Asia-Pacific grows at XX% through 2031 from a XX% base-year share. China combines a substantial processing and export base with domestic demand across frozen, dehydrated and pickled vegetables; India offers growth through organized retail, foodservice and agricultural processing investment. Japan supports demand for reliable quality and convenient preparation, while Australia provides an established branded and private-label market. Product adaptation matters: locally relevant vegetable mixtures, pack sizes and cooking methods can be more important than transferring Western assortments unchanged.

North America contributes XX% of global revenue, supported by frozen potatoes, canned vegetables and established grocery freezer categories. Restaurant demand and retail affordability shape purchasing in the United States, while Canada combines domestic consumption with processing and export capacity. Latin America and the Middle East and Africa account for XX% and XX%, respectively. Brazil offers domestic agricultural scale, Saudi Arabia relies on a mix of imports and local distribution investment, and South Africa provides an established processing and retail base. Across these markets, ambient formats retain advantages where freezer availability and distribution economics constrain frozen penetration.

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
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

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Processed And Frozen Vegetables Market Competitive Landscape and Company Share

The market has moderate concentration, with the leading five corporate groups accounting for XX% of global value. Competitive positions differ sharply by product: McCain Foods, Lamb Weston and Aviko are prominent frozen potato participants, while Bonduelle, Ardo and Greenyard have broad vegetable capabilities. Conagra Brands and B&G Foods compete through recognizable consumer brands, and Seneca Foods has an established position in shelf-stable processing. A global share assessment must isolate included vegetable sales from complete meals, meat, seafood, fresh produce and other unrelated activities.

Agricultural access and conversion economics are durable sources of advantage. Processors compete for suitable acreage, crop quality and dependable harvest windows before competing for shelf space. Scale supports procurement, automation and customer service, but large plants remain exposed when poor harvests or weak customer demand reduce utilization. Capacity investments therefore require a credible balance between crop availability, contracted demand and the cost of serving destination markets.

Portfolio transactions are reshaping ownership of brands and processing assets. Seneca's acquisition of the Green Giant shelf-stable business illustrates the distinction between brand rights and preservation-category ownership, while capacity actions by frozen potato suppliers highlight the importance of matching supply to customer demand. The report compares acquisitions, plant investments, restructuring and private-label expansion against product-specific economics. Company profiles separate corporate performance from revenue attributable to the defined market.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
McCain Foods	XXX	XXX	XXX	XXX
Lamb Weston	XXX	XXX	XXX	XXX
Aviko	XXX	XXX	XXX	XXX
Bonduelle	XXX	XXX	XXX	XXX
Ardo	XXX	XXX	XXX	XXX
Greenyard	XXX	XXX	XXX	XXX
Conagra Brands	XXX	XXX	XXX	XXX
Seneca Foods	XXX	XXX	XXX	XXX
B&G Foods	XXX	XXX	XXX	XXX
Nomad Foods	XXX	XXX	XXX	XXX

Source: XXX

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Processed And Frozen Vegetables Market Forecast and Investment Opportunities

The market adds USD XXX billion in annual revenue between 2025 and 2031. Volume growth comes from broader distribution, foodservice requirements and household convenience, while product mix and pricing also contribute to value expansion. Frozen products remain the largest preservation category, but ambient and dehydrated formats provide complementary routes to customers whose storage, logistics or manufacturing requirements favor alternatives to freezing. Investment decisions should follow category-level demand and margin potential rather than aggregate market growth alone.

The strongest operating models combine reliable agricultural supply, flexible processing, customer-specific product development and disciplined capital allocation. Processors that can document usable yield, cooking performance and cost per serving are better positioned to defend commercial terms. Regional production networks also gain strategic relevance where import exposure, freight variability and customer lead-time requirements justify local capacity.

Scenario analysis tests the forecast against crop disruption, energy prices, household purchasing power, restaurant traffic and the pace of cold-chain expansion. A stronger outcome would combine affordable energy, stable harvests and faster distribution gains in Asia-Pacific. A weaker outcome would involve repeated procurement shocks and slower customer demand, extending the payback period for new plants. Capacity utilization, contracted acreage, private-label tender economics and customer inventories are the principal indicators to monitor.

Opportunities

- Locally adapted frozen vegetable mixtures for Asian households and restaurant chains
- Frozen potato capacity linked to contracted foodservice demand
- Low-sodium canned vegetables and pickles with recognizable ingredient lists
- Private-label products differentiated by texture, provenance and cooking performance
- Dehydrated vegetable ingredients for seasonings, snacks and meal manufacturing
- Water-efficient processing and lower-energy freezing systems
- Ambient vegetable formats for markets with limited household freezer penetration
- Traceable agricultural sourcing and verified residue-management programmes

> 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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