



Global Frozen Broccoli 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 2.1 bn
Forecast (2031)	USD 3 bn
CAGR (2021-2031)	5.8%
Study period	2021-2031
Largest region	Europe · 34.7%
Fastest-growing region	Asia-Pacific · 7.4%
Market concentration	Moderate
Licence	Individual / Company

The global frozen broccoli 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 cuts toward premium florets, steam-ready packaging, seasoned sides and broccoli-rich vegetable blends. Europe held XX% of global market value in 2025, while Asia-Pacific will record the fastest regional growth at XX% through 2031. Retail private labels, foodservice recovery and investment in integrated grower-processing networks are reshaping procurement and competitive strategy.

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Executive summary

The global frozen broccoli 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 cuts toward premium florets, steam-ready packaging, seasoned sides and broccoli-rich vegetable blends. Europe held XX% of global market value in 2025, while Asia-Pacific will record the fastest regional growth at XX% through 2031. Retail private labels, foodservice recovery and investment in integrated grower-processing networks are reshaping procurement and competitive strategy.

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

Key findings

- Global frozen broccoli sales reached USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Europe accounted for XX% of global value in 2025, supported by established private-label penetration and dense frozen-food distribution.
- Asia-Pacific will expand at a XX% CAGR through 2031 as urban cold-chain coverage and modern grocery penetration increase.
- Plain florets represented XX% of 2025 market value, while seasoned and sauced broccoli will grow fastest at XX% annually.
- Retail generated XX% of market value in 2025, with supermarkets and hypermarkets remaining the largest purchasing channel.
- Consumer packs of 1 kilogram or less accounted for XX% of sales, reflecting household demand for portionable and microwave-ready formats.
- USDA Economic Research Service data show that US frozen broccoli imports were valued at USD XXX million in 2023, up XX% from 2022.
- US frozen vegetable import value exceeded USD XXX billion in 2024, increasing XX% year over year, according to the USDA Economic Research Service.

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 Frozen Broccoli Market Trends and Growth Drivers

Frozen broccoli sits at the intersection of vegetable nutrition, household convenience and industrial cold-chain capability. The category's underlying volume is defensive, but value growth increasingly depends on whether suppliers can transform a standardized agricultural product into a differentiated meal component.

Raw-material economics remain decisive. Floret yield, stem utilization, contracted acreage and harvest-to-freezer time determine the cost curve, while electricity, packaging and refrigerated transport shape conversion margins. Scale provides purchasing and utilization advantages, but regional processors can compete effectively where proximity to growers reduces raw-material and logistics risk.

Demand conditions favor a two-track market. Private-label plain broccoli supplies household volume and price accessibility, while branded and premium ranges build margin through steam preparation, seasoning, sauces, organic certification and curated blends.

Growth drivers

Convenience-led vegetable adoption

Frozen broccoli removes washing, trimming and spoilage from household meal preparation while retaining year-round availability. This makes the category especially effective for time-constrained families, smaller households and consumers seeking predictable portions.

Steam-ready and value-added formats

Microwaveable bags, roasting trays and pre-seasoned broccoli raise realization per kilogram and broaden the product from an ingredient into a ready side dish. Brand owners are using sauces, cheese, spices and cooking-format claims to reduce direct price comparison with commodity packs.

Private-label freezer expansion

Large grocery chains are widening good-better-best frozen vegetable architectures and sourcing directly from scaled processors. Broccoli benefits because it is a familiar, high-rotation vegetable capable of supporting economy cuts, core florets and premium organic tiers.

Foodservice menu standardization

Restaurants, schools, hospitals and contract caterers require consistent portioning, minimal preparation labor and reliable year-round supply. Bulk frozen broccoli meets these requirements and is gaining relevance in vegetable-forward bowls, side dishes and prepared meal systems.

Emerging-market cold-chain buildout

New distribution centers, modern retail freezers and last-mile temperature-controlled logistics are extending frozen-food availability beyond top-tier cities. The effect is strongest where fresh broccoli supply is seasonal or expensive and imported frozen product offers consistent quality.

Health-positioned frozen innovation

Broccoli's established association with fiber, vitamins and vegetable intake gives manufacturers a strong platform for health-oriented innovation. Plain products serve clean-label demand, while broccoli rice, blends and portion-controlled sides address lower-carbohydrate and plant-forward eating occasions.

Restraints

Crop and procurement volatility

Broccoli yields and quality grades are sensitive to heat, water availability, pests and harvest timing. Shortfalls reduce floret recovery, increase dependence on cuts and blends, and force processors to compete for contracted acreage.

Freezing and cold-chain costs

Blanching, individual quick freezing, frozen storage and temperature-controlled transport create sustained electricity and capital requirements. Energy-price spikes compress processor margins and disproportionately affect long-distance trade in value-oriented bulk product.

Food-safety compliance exposure

Environmental pathogens, pesticide residues and cold-chain deviations can trigger product holds, recalls and customer delisting. Retailers increasingly require rigorous environmental monitoring, traceability and supplier-audit programs in addition to statutory compliance.

Commodity price competition

Plain frozen broccoli competes with seasonal fresh broccoli and lower-priced frozen peas, carrots and mixed vegetables. Aggressive private-label tenders constrain price realization where products lack clear differentiation in floret size, origin, certification or preparation format.

Frozen Broccoli Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Convenience-led vegetable adoption	XXX	XXX	XXX
Steam-ready and value-added formats	XXX	XXX	XXX
Private-label freezer expansion	XXX	XXX	XXX
Foodservice menu standardization	XXX	XXX	XXX
Emerging-market cold-chain buildout	XXX	XXX	XXX
Health-positioned frozen innovation	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Crop and procurement volatility	XXX	XXX	XXX
Freezing and cold-chain costs	XXX	XXX	XXX
Food-safety compliance exposure	XXX	XXX	XXX
Commodity price competition	XXX	XXX	XXX

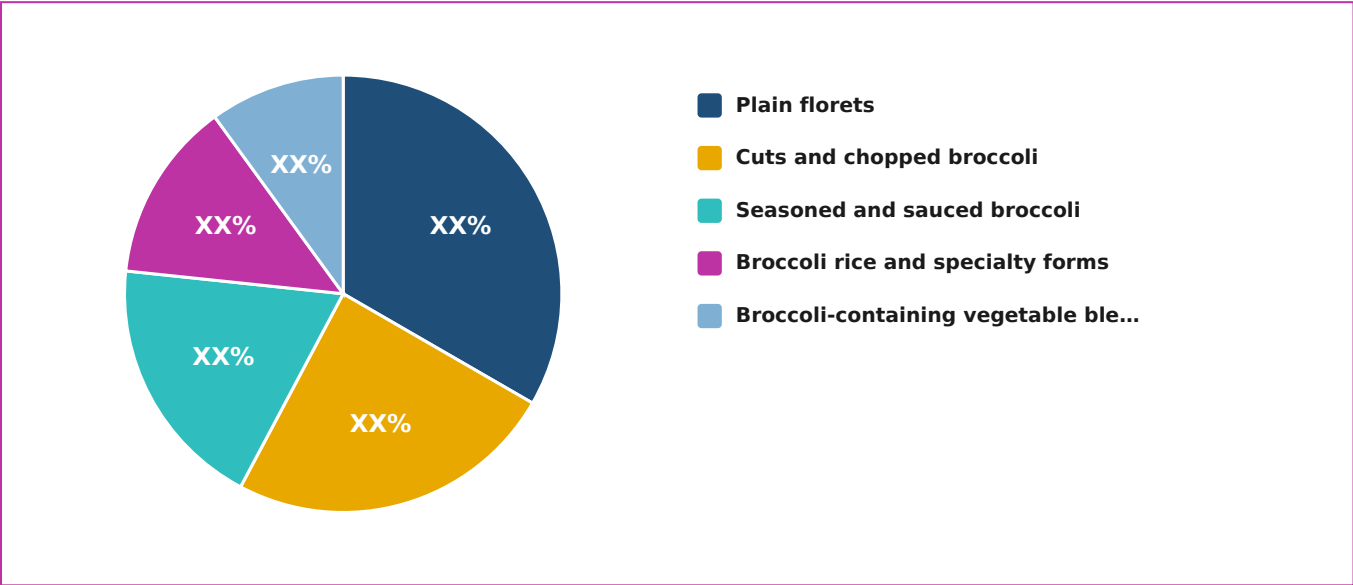
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Frozen Broccoli Market Segmentation Analysis

By Product Form

Florets command the largest share because consumers and foodservice buyers associate visible crowns with higher quality and lower preparation waste. Cuts and chopped broccoli remain important in value packs, soups, prepared foods and institutional kitchens. Seasoned and sauced formats are gaining fastest as suppliers convert broccoli into a premium ready-to-heat side.

Value share by product Form, 2025



Source: XXX

Value by product Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Plain florets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cuts and chopped broccoli	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Seasoned and sauced broccoli	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Broccoli rice and specialty forms	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Broccoli-containing vegetable blends	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

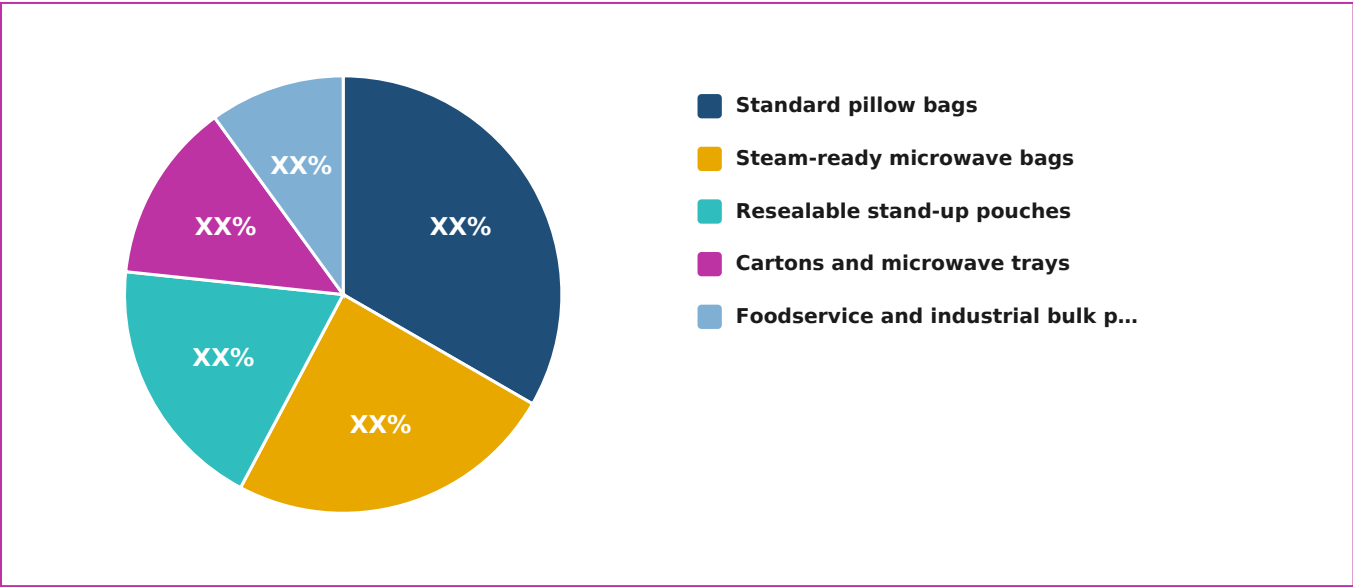
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By Packaging Format

Conventional pillow bags retain scale advantages and dominate economy and private-label assortments. Steam-ready packaging is taking share because it reduces preparation steps and supports portion control without transferring the product to another vessel. Cartons, trays and large flexible packs serve premium

sides, club retail and foodservice requirements.

Value share by packaging Format, 2025



Source: XXX

Value by packaging Format, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Standard pillow bags	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Steam-ready microwave bags	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Resealable stand-up pouches	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cartons and microwave trays	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice and industrial bulk packs	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Pack Size

Small consumer packs lead because broccoli is commonly purchased as a household side or recipe ingredient and buyers value easy freezer storage. Family and club packs are growing through value-led retail and larger households. Packs above 5 kilograms serve restaurants, institutions and industrial users that prioritize yield and handling efficiency.

Value by pack Size, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Up to 500 grams	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
501 grams to 1 kilogram	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
1.01 to 5 kilograms	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 5 kilograms	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Supermarkets and hypermarkets dominate through extensive freezer space, private-label ranges and frequent household replenishment. Online grocery is expanding from a smaller base as retailers improve insulated fulfillment and frozen-slot availability. Foodservice growth is supported by standardized sides, prepared meals and institutional nutrition, while industrial buyers use broccoli in soups, bowls and composite foods.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Supermarkets and hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Discounters and convenience retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online grocery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial and ingredient users	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

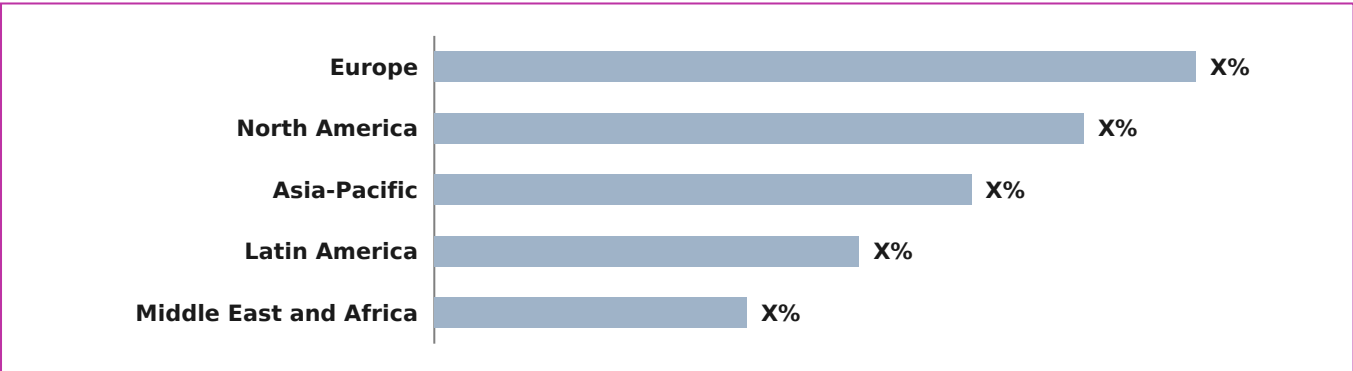
Frozen Broccoli Market Regional Analysis and Country Outlook

Europe led the frozen broccoli market with XX% of global value in 2025. Germany, the United Kingdom, France, Italy and the Nordic countries combine mature household freezer usage with strong supermarket private labels, while Belgium, France, Spain and Poland form important processing and intra-European supply nodes. Retailer specifications increasingly emphasize contracted origin, pesticide-residue performance, recyclable packaging and energy-efficient processing.

North America represented XX% of 2025 value, with the United States accounting for the majority of regional demand. USDA data place US frozen broccoli imports at USD XXX million in 2023, underscoring the country's reliance on internationally sourced product. Growth is moving toward steam-ready florets, cheese and butter sauces, oven-roasting formats and foodservice vegetable sides.

Asia-Pacific will post the fastest regional CAGR of XX% through 2031. China combines a large broccoli-growing base with expanding domestic frozen-food demand, while Japan and South Korea offer high-value retail and foodservice markets. India and Southeast Asia are developing from a smaller base as modern grocery, quick-commerce and temperature-controlled logistics improve product access.

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

Frozen Broccoli Market Competitive Landscape and Company Share

The market is moderately concentrated at the processor level and more fragmented at the consumer-brand level. Ardo, Greenyard, Bonduelle, Nomad Foods and Conagra combine established grower relationships, freezing capacity and major retail or foodservice accounts, while regional processors compete through local crop access, flexible private-label production and cost-efficient bulk supply.

Competitive advantage rests on agricultural integration, floret recovery, plant utilization, food-safety performance and service reliability. Greenyard's completed alliance with Eureden in France demonstrates the industry's preference for combining grower bases, manufacturing assets and commercial reach in strategically important production regions.

Portfolio strategy is moving beyond plain bags. Conagra has expanded Birds Eye and Alexia into garlic-butter, cheese-sauce and roasted broccoli products, while other suppliers are developing organic lines, air-fryer formats and vegetable blends. M&A and strategic investment will remain focused on crop security, regional scale, automation and cold-chain efficiency.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Ardo	XXX	XXX	XXX	XXX
Greenyard	XXX	XXX	XXX	XXX
Bonduelle Group	XXX	XXX	XXX	XXX
Conagra Brands	XXX	XXX	XXX	XXX
Nomad Foods	XXX	XXX	XXX	XXX
McCain Foods	XXX	XXX	XXX	XXX
Simplot	XXX	XXX	XXX	XXX
Congelados de Navarra	XXX	XXX	XXX	XXX
Virto Group	XXX	XXX	XXX	XXX
Crop's	XXX	XXX	XXX	XXX

Source: XXX

Frozen Broccoli Market Forecast and Commercial Opportunities

Global market value will increase by USD XXX million between 2025 and 2031. Volume growth will remain steady, but mix improvement will make a larger contribution as retail shelves allocate more space to steam-ready, seasoned, organic and roasting-oriented products.

The central forecast assumes normalized agricultural availability, continued modern-retail investment and moderate real pricing. A stronger cold-chain investment cycle in Asia-Pacific would accelerate demand above the baseline, while consecutive crop disruptions and sustained energy inflation would slow volume conversion in price-sensitive markets.

Winning suppliers will combine multi-region sourcing with disciplined grower contracts, automated optical sorting, high floret recovery and auditable sustainability performance. Commercial growth will favor processors capable of serving both high-volume private-label tenders and differentiated branded or foodservice applications from the same asset network.

Opportunities

- Premium seasoned, roasted and cheese-sauce broccoli
- Broccoli-rich vegetable blends for air-fryer and microwave preparation
- Organic and verified-residue retail ranges
- Foodservice packs for institutional nutrition programs
- Local processing partnerships in Asia-Pacific
- Lower-carbon freezing, storage and packaging systems

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.