

Flour Market Forecasts to 2032 – Global Analysis By Type (Wheat Flour, Rice Flour, Maize Flour, Rye Flour, Oat Flour, Barley Flour, Legume Flour, Nut & Seed Flour, and Other Types), Nature, Form, Distribution Channel, Application, End User, and By Geography

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Abstracts

According to Statistics MRC, the Global Flour Market is accounted for \$46.50 billion in 2025 and is expected to reach \$71.33 billion by 2032 growing at a CAGR of 6.3% during the forecast period. Flour is a fine powder made by grinding raw grains, legumes, nuts, or seeds. Most commonly, it is produced from wheat and is a staple ingredient in baking and cooking worldwide. Flour provides structure to baked goods through its gluten-forming proteins and starch content. Varieties include all-purpose, whole wheat, rice, and almond flour, each suited to different dietary needs and recipes, making it a versatile and essential food product.

According to NABIM (National Association of British and Irish Millers), UK flour milling industry's annual revenue was around US\$ 1.73 billion in 2017.

Market Dynamics:

Driver:

Rising demand for bakery products

Increased urbanization and changing dietary preferences have led to a rise in demand for convenience foods, especially baked goods. Flour remains a staple ingredient in bread, cakes, cookies, and pastries, making it indispensable to the food industry. Rising disposable incomes and an expanding middle class in developing regions have further

propelled this trend. Health-conscious consumers are increasingly seeking nutritious alternatives, leading manufacturers to innovate with fortified and whole grain flour varieties. This sustained demand across both premium and value segments drive the growth of the global flour market.

Restraint:

Fluctuating raw material prices

Climate change, unpredictable weather conditions, and geopolitical tensions often disrupt grain supply chains, leading to cost instability. Transportation and storage costs also influence final pricing, particularly in regions with underdeveloped infrastructure. As flour is a commoditized product, producers struggle to absorb cost hikes without affecting margins or retail prices. Frequent price fluctuations hinder long-term planning and investment in production technologies. These dynamics make it difficult for manufacturers to maintain consistent profitability, especially in competitive markets.

Opportunity:

Technological advancements in milling

Modern milling technologies are transforming flour production by improving efficiency, yield, and quality. Innovations like roller mills, automated packaging systems, and optical grain sorters are reducing waste and enhancing output. Advances in grain processing also allow producers to create specialty flours tailored to dietary and functional needs. Sustainable milling practices, including water and energy conservation, are gaining traction among eco-conscious producers. Enhanced digital integration is streamlining operations and enabling real-time quality control.

Threat:

Health concerns over gluten

Growing awareness around gluten-related health issues is influencing consumer choices and product development. Conditions such as celiac disease and gluten intolerance have led to a surge in demand for gluten-free flour alternatives. This shift is especially pronounced in developed regions, where dietary trends closely follow health research and social media influence. Traditional wheat flour-based products face stiff competition from those made with rice, almond, sorghum, or chickpea flour. These

factors collectively threaten the dominance of conventional flour varieties, prompting manufacturers to diversify.

Covid-19 Impact:

The pandemic disrupted flour supply chains due to lockdowns, labor shortages, and transport restrictions. Initial panic buying caused temporary spikes in demand, overwhelming production and packaging capacities. Bakeries and restaurants faced closures, curbing commercial usage, but at-home baking surged, driving retail flour sales. Flour producers adapted by optimizing digital distribution and direct-to-consumer channels. As economies reopened, there was renewed emphasis on automation and food safety across flour mills. The crisis ultimately accelerated innovation and resilience in the flour market, laying the groundwork for long-term recovery and growth.

The organic flour segment is expected to be the largest during the forecast period

The organic flour segment is expected to account for the largest market share during the forecast period, driven by rising health awareness and consumer preference for chemical-free, non-GMO food products. Increasing concerns over pesticide residues in conventional grains are prompting a shift toward organic alternatives. The expansion of the organic food industry, coupled with higher disposable incomes and supportive government regulations, also supports market growth. Additionally, the perceived environmental and nutritional benefits of organic farming contribute to the popularity of organic flour.

The food industry segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the food industry segment is predicted to witness the highest growth rate, driven by rising consumption across packaged and prepared food categories. Flour is a critical input in countless food applications, including snacks, ready-to-eat meals, and baby food. Global trends toward convenience, health, and indulgence are reshaping product offerings and ingredient profiles. Large food manufacturers are increasing flour procurement to meet evolving consumer demands.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, due to its vast population and evolving dietary habits. Flour consumption is rising

rapidly in countries like India, China, and Indonesia, driven by traditional food preferences and modern lifestyle changes. Government support for domestic agriculture and food processing industries enhances flour production capabilities. Technological adoption and foreign investment in milling infrastructure are also boosting market penetration.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, due to health-conscious and experiment-driven consumers. Gluten-free, organic, and specialty flours are witnessing strong growth as consumers seek cleaner labels and nutritional benefits. Increased awareness about food allergies and functional foods is driving innovation. Advanced production technologies and robust retail networks support market expansion.

Key players in the market

Some of the key players in Flour Market include Cargill, Incorporated, Hodgson Mill, Inc., Archer Daniels Midland Company (ADM), King Arthur Baking Company, Inc., Ardent Mills LLC, Goodman Fielder Pty Limited, General Mills, Inc., Interflour Group, Conagra Brands, Inc., Wudeli Flour Mill Group, Associated British Foods Plc (ABF), ITC Limited, Wilmar International Limited, The King Milling Company, and Grain Craft.

Key Developments:

In May 2025, Cargill Bioindustrial and Arizona State University (ASU) are launching a new, year-long research partnership focused on advanced materials used in semiconductor technology — the foundation of modern electronics from smartphones to electric vehicles. The research is focused on Cargill™ Priamine™ dimer diamine, which is made from bio-based ingredients.

In March 2025, ADM and Mitsubishi Corporation announced that both companies have signed a non-binding memorandum of understanding to form a strategic alliance to explore potential areas of future collaboration across the agriculture value chain.

Types Covered:

Wheat Flour

Rice Flour

Maize Flour

Rye Flour

Oat Flour

Barley Flour

Legume Flour

Nut & Seed Flour

Other Types

Nature Covered:

Conventional Flour

Organic Flour

Forms Covered:

Powder

Granules

Flakes

Pellets

Distribution Channels Covered:

Supermarkets/Hypermarkets

Convenience Stores

Online Retail

Direct Sales

Specialty Stores

Applications Covered:

Bakery Products

Noodles & Pasta

Animal Feed

Other Applications

End Users Covered:

Households

Food Industry

HoReCa

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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