

Almond Flour Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product Type (Natural Vs. Blanched), By Nature (Organic Vs. Conventional), By Application (Bakery, Confectionery, Cosmetics, Others), By End Use (Residential Vs. Commercial/Industrial), By Distribution Channel (Offline Vs. Online), By Region & Competition, 2021-2031F

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Abstracts

The Global Almond Flour Market is projected to expand from USD 1.57 Billion in 2025 to USD 2.53 Billion by 2031, achieving a CAGR of 8.28%. Almond flour, a gluten-free product made from ground, blanched almonds, offers a nutrient-rich substitute for wheat flours. The market's growth is fundamentally fueled by the rising incidence of celiac disease and the broad acceptance of paleo and ketogenic lifestyles, which demand low-carbohydrate, high-protein baking alternatives. These primary drivers generate a consistent demand for functional plant-based ingredients, establishing this sector as a long-term shift rather than a fleeting dietary trend.

According to the November 2025 Position Report by the Almond Board of California, total almond exports grew by 5.2% in October 2025, signaling strong international demand for almond-based products. However, the market faces a substantial obstacle regarding the volatility of raw material costs, driven by climatic risks and water scarcity in key growing areas. These environmental factors lead to supply inconsistencies and increased costs for manufacturers, creating fluctuations that affect the pricing of finished goods.

Market Driver

The growth of the gluten-free bakery and confectionery industries serves as a major catalyst for the Global Almond Flour Market. As consumers increasingly identify gluten intolerances or voluntarily pursue grain-free diets, almond flour has become the preferred functional replacement for wheat due to its ability to replicate the mouthfeel and texture of traditional baked items. This structural change is highlighted by the strong performance of grain-free segments, where almond flour is now a core staple rather than a niche option. Data from the Plant Based Foods Association's "2024 Plant-Based Foods State of the Marketplace Report," released in May 2025, indicates that sales of plant-based baked goods rose by 13% to \$111 million, emphasizing the vital role of nut flours in driving category expansion.

Market development is further accelerated by product versatility and processing innovations, with manufacturers utilizing almond flour's neutral taste and high lipid content for applications ranging from thickeners to coatings. Leading processors are responding to this trend by enhancing their value-added ingredient portfolios to meet industrial needs. For example, Blue Diamond Growers reported net sales of \$1.51 billion in their "2025 Annual Report" from October 2025, reflecting strong commercial adoption of innovative almond derivatives. This demand is supported by a massive supply chain capacity; the Almond Board of California noted in August 2025 that total almond export shipments for the 2024 crop year reached 1.98 billion pounds, ensuring sufficient raw material availability for global flour production.

Market Challenge

The instability of raw material costs presents a significant barrier to the expansion of the global almond flour market. This volatility is largely driven by water scarcity and climatic risks in major cultivation regions, resulting in unpredictable yields and inconsistent supplies. When raw almond availability fluctuates, manufacturers encounter immediate cost increases that complicate production planning and reduce profit margins. As a result, companies find it difficult to maintain competitive pricing against wheat-based or other gluten-free substitutes, which limits market penetration among price-sensitive consumer groups.

This challenge is intensified by structural reductions in the agricultural land dedicated to almond farming, threatening long-term supply stability. According to the Almond Board of California, total almond acreage fell by approximately 40,000 acres in 2024 compared to the prior year, marking the third consecutive annual decline. This sustained

contraction, caused by environmental resource limits, restricts the consistent volume of raw materials needed for large-scale flour processing. Consequently, the industry faces persistent supply-side pressure that hinders its capacity to satisfy broadening global demand.

Market Trends

The emphasis on Sustainable and Regenerative Farming Certifications is transforming the global almond flour market, as industrial buyers and consumers increasingly require transparency regarding environmental impact. Manufacturers are distinguishing their products by adopting rigorous agricultural standards that address issues such as pollinator health and water efficiency, moving beyond basic compliance to secure premium market positioning. This shift is evident among leading cooperatives; Blue Diamond Growers noted in their October 2024 "2024 Annual Report" that nearly 20% of their total acreage has reached the highest tier of the Orchard Stewardship Incentive Program, which mandates verified carbon sequestration and Bee Friendly Farming certification.

Simultaneously, the rise of Private Label and Direct-to-Consumer Channels is fundamentally altering the competitive landscape by commoditizing almond flour and increasing its accessibility. As the ingredient evolves from a niche health product to a pantry essential, major retailers are introducing high-quality store-brand alternatives that challenge legacy manufacturers on price, while direct-to-consumer platforms facilitate bulk purchasing for home bakers. This structural market evolution is reflected in broader retail data; according to the Private Label Manufacturers Association's "2024 Year-End Market Report" from January 2025, total annual sales for U.S. store brands hit a record \$271 billion in 2024, signaling a robust consumer shift toward private label options that directly impacts premium ingredient categories.

Key Market Players

Blue Diamond Growers

Wonderful Pistachios & Almonds

Mariani Nut Company

Hampton Farms

Treehouse Almonds

Olam International

Sun Valley Nut Company

Bunge Limited

Archer Daniels Midland Company

Kerry Group

Report Scope

In this report, the Global Almond Flour Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Almond Flour Market, By Product Type

Natural Vs. Blanched

Almond Flour Market, By Nature

Organic Vs. Conventional

Almond Flour Market, By Application

Bakery

Confectionery

Cosmetics

Others

Almond Flour Market, By End Use

Residential Vs. Commercial/Industrial

Almond Flour Market, By Distribution Channel

Offline Vs. Online

Almond Flour Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Almond Flour Market.

Available Customizations:

Global Almond Flour Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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