

Frozen Food Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Frozen Fruits, Frozen Vegetables, Dairy Products, Frozen Soup, Frozen Meat & Seafood, Frozen Convenience Food & Ready Meals, Others), By Type (Raw Material, Half Cooked, Ready-to-eat), By End User (Food Service Industry, Retail Customers), By Distribution Channel (Offline, Online), By Region & Competition, 2021-2031F

<https://marketpublishers.com/r/F79DDB290382EN.html>

Date: January 2026

Pages: 186

Price: US\$ 4,500.00 (Single User License)

ID: F79DDB290382EN

Abstracts

The Global Frozen Food Market is projected to expand from USD 337.23 Billion in 2025 to USD 458.68 Billion by 2031, reflecting a CAGR of 5.26%. Frozen food products are defined by preservation methods that rapidly lower temperatures to halt microbial activity, effectively prolonging shelf life while retaining nutritional value. A key factor propelling market growth is the heightened consumer demand for convenience amidst busy lifestyles, alongside the economic advantage of minimizing food waste, which resonates with both residential and commercial sectors. This demand for durable food solutions supports sustained market activity; for instance, the British Frozen Food Federation reported that frozen food retail sales in the United Kingdom totaled ?8.5 billion for the 52-week period ending in March 2024.

Conversely, a major hurdle restricting market progress is the substantial operational expense required to uphold an uninterrupted cold chain. The logistical intricacies involved in storing and shipping products at constant sub-zero temperatures demand specialized facilities and significant energy usage. This reliance makes manufacturers and distributors susceptible to fluctuating global energy costs, which can diminish profit

margins and hinder the viability of extending distribution channels into developing regions with unstable power infrastructures.

Market Driver

The escalating need for convenience and ready-to-eat meal options, spurred by evolving consumer lifestyles and the adoption of modern cooking technologies, serves as a primary engine for the Global Frozen Food Market. Contemporary consumers prioritize efficient meal solutions that save time without sacrificing quality, resulting in a proliferation of products tailored for specific kitchen devices. This trend is particularly noticeable in the rising demand for items optimized for air fryers, which deliver a blend of speed and health benefits suitable for busy households. For example, Conagra Brands noted in its 'Future of Frozen Foods 2025' report from December 2024 that sales of air fryer-compatible frozen foods in the United States hit \$6.1 billion, demonstrating the substantial commercial influence of appliance-focused convenience trends.

Concurrently, robust demand from the food service and quick-service restaurant sectors significantly underpins market growth. As the hospitality industry strives for operational efficiency, commercial entities increasingly depend on frozen ingredients to manage inventory costs, maintain consistent menus, and offset labor shortages. This reliance guarantees a steady trade volume for producers who can ensure supply chain reliability. According to the Deutsches Tiefkühlinstitut in April 2024, frozen food sales in the German out-of-home market rose by 6.5% to 2.061 million tonnes in 2023, signaling a strong sector recovery. This momentum is further evidenced by major players like Nomad Foods, which reported a 6% revenue increase to \$3.0 billion for the full year 2023, indicating the sustained financial strength of the frozen food category.

Market Challenge

The elevated operational costs required to maintain a seamless cold chain constitute a significant obstacle to the expansion of the global frozen food market. Unlike ambient food logistics, the frozen segment necessitates continuous energy consumption to keep inventory at consistent sub-zero temperatures from production through to the final sale. This logistical complexity requires specialized warehousing and refrigerated transport fleets, resulting in a rigid cost structure that is acutely responsive to external economic shifts. Consequently, when energy prices escalate, manufacturers and distributors suffer immediate margin compression, as pausing energy usage is impossible without incurring product spoilage and significant financial damage.

This financial susceptibility notably restricts the industry's capacity to penetrate new territories. Data from the Cold Chain Federation's 'Cold Chain Report 2024' indicates that the sector faced a 46% year-on-year increase in energy costs. Such volatility renders it financially risky to build distribution networks in emerging regions characterized by developing power grids or unpredictable utility rates. As a result, companies often confine their activities to established markets, thereby stalling the industry's global expansion and limiting potential revenue generation from untapped consumer groups.

Market Trends

The emergence of premium and gourmet "restaurant-at-home" experiences is transforming the market as consumers increasingly look for convenient, high-quality substitutes for dining out. This trend is defined by a move toward complex flavor profiles and upscale formats that replicate culinary dishes, frequently driven by retailers broadening their exclusive ranges to offer value while maintaining taste standards. The appetite for these sophisticated at-home dining solutions is reflected in the strong performance of store brands, which have transitioned from budget staples to destination items featuring restaurant-quality recipes. According to the Private Label Manufacturers Association's 'Private Label's Growth Surge' report from July 2025, frozen private-label dollar sales rose by 3.8% for the 52 weeks ending June 15, underscoring the segment's competitive power and appeal in this premium category.

At the same time, the incorporation of functional, clean-label, and gut-healthy ingredients is emerging as a vital differentiator for manufacturers seeking to meet modern wellness demands. Shoppers are examining ingredient labels more rigorously, preferring products that provide nutritional transparency and specific health advantages, such as high fiber or the exclusion of artificial additives. This emphasis on "better-for-you" formulations is driving major industry stakeholders to revise their portfolios to adhere to strict nutritional benchmarks. For instance, Nomad Foods stated in its '2024 Sustainability Report' in August 2025 that 96% of the company's branded net sales were derived from products categorized as Healthier Meal Choices, highlighting the significant commercial success of nutrition-centric strategies within the frozen sector.

Key Market Players

Unilever PLC

Nestle S.A.

General Mills, Inc.

Nomad Foods Ltd.

Tyson Foods Inc.

Conagra Brands Inc.

Wawona Frozen Foods

Bellisio Parent, LLC

The Kellogg Company

The Kraft Heinz Company

Report Scope

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

Frozen Food Market, By Product

Frozen Fruits

Frozen Vegetables

Dairy Products

Frozen Soup

Frozen Meat & Seafood

Frozen Convenience Food & Ready Meals

Others

Frozen Food Market, By Type

Raw Material

Half Cooked

Ready-to-eat

Frozen Food Market, By End User

Food Service Industry

Retail Customers

Frozen Food Market, By Distribution Channel

Offline

Online

Frozen Food 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 Frozen Food Market.

Available Customizations:

Frozen Food Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Fro...

Global Frozen Food 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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