

Frozen Vegetables Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Beans, Corn, Peas, Mushroom, Cauliflower, Asparagus, Broccoli, Others), By Application (Food Service Industry, Retail Customers), By Distribution Channel (Supermarkets/Hypermarkets, Grocery Stores, Convenience Stores, Others), By Region & Competition, 2021-2031F

<https://marketpublishers.com/r/FEC0365CCB93EN.html>

Date: May 2026

Pages: 192

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

ID: FEC0365CCB93EN

Abstracts

The Global Frozen Vegetables Market is projected to expand from USD 21.42 billion in 2025 to USD 28.66 billion by 2031, reflecting a compound annual growth rate of 4.97%. These products, which consist of fresh produce preserved through rapid freezing methods to maintain essential nutrients and texture, are witnessing increased demand primarily due to the convenience they offer. Consumers increasingly favor these items for their extended shelf life and reduced preparation time compared to fresh alternatives, while the ability to access seasonal produce year-round supports consistent purchasing across both commercial and residential sectors. For example, the British Frozen Food Federation reported that the retail frozen vegetable category in the United Kingdom reached a value of ?574 million in 2024, highlighting the sustained consumer reliance on these staple goods.

However, the industry faces substantial obstacles related to the high costs associated with cold chain logistics. The requirement to maintain constant freezing temperatures during both storage and transport necessitates significant energy consumption, which drives up operational expenses. This dependence on complex infrastructure can hinder market growth, particularly in areas where maintaining an unbroken cold chain is not

economically viable. Consequently, volatility in energy prices presents a direct risk to profit margins and limits the widespread accessibility of these products.

Market Driver

The escalating demand for convenience foods, resulting from increasingly hectic lifestyles, serves as a primary catalyst for the Global Frozen Vegetables Market. Modern consumers, limited by time constraints, prioritize meal solutions that minimize preparation tasks such as washing, peeling, and chopping. Frozen vegetables effectively address this requirement by providing pre-cut, ready-to-cook alternatives that preserve nutritional quality while significantly decreasing kitchen labor. This transition is highlighted by the growing reliance on frozen sides and meal components that allow for quick home cooking without sacrificing health. For instance, the American Frozen Food Institute's "Frozen Food Sales Are in the Black" report from July 2024 notes that unit sales of frozen side dishes in the United States rose by 3.2% in the first half of the year, underscoring this preference for efficiency and ease.

Simultaneously, the rising adoption of vegan and plant-based diets is redefining market dynamics and broadening the consumer base. As individuals become more environmentally aware and health-conscious, they are moving away from animal products, elevating vegetables from side dishes to main course staples. Frozen formats guarantee the year-round availability of a wide variety of plant-based ingredients, thereby supporting this dietary shift. According to The Grocer in December 2024, nearly one-third of shoppers in the UK who enter the frozen food aisle do so specifically to follow a vegetarian or vegan diet. Additionally, a January 2024 report by Conagra Brands titled "Future of Frozen Food 2024" indicates that over 50% of U.S. households stock frozen food, with vegetables named as the most frequently purchased category, emphasizing their critical role in modern diets.

Market Challenge

The stringent necessity of maintaining an unbroken cold chain places a severe financial strain on the global frozen vegetables market, largely due to the immense energy expenditure needed for preservation. The high electricity consumption required for continuous freezing during warehousing and transportation makes the industry vulnerable to volatile energy markets, which significantly inflates operational costs. This economic burden hampers the development of essential infrastructure in emerging markets and reduces profit margins, making it challenging for manufacturers to absorb these costs without passing them on to consumers.

The direct consequence of these escalating costs is a deceleration in market accessibility and reach. When logistics expenses rise, they serve as a barrier to the expansion of distribution channels, effectively limiting growth potential in regions with developing cold chain capabilities. This financial instability is underscored by recent industry data; the Cold Chain Federation's 2024 report revealed that the sector experienced a 46% increase in energy costs compared to the prior year. Such a steep rise in essential overheads directly limits the industry's ability to scale operations and sustain competitive pricing strategies on a global level.

Market Trends

The emergence of vegetable formulations optimized for air fryers is fundamentally transforming product development strategies, as manufacturers re-engineer textures to mimic fried consistency without using excessive oils. This trend goes beyond simple convenience to focus on providing superior sensory experiences in items like battered cauliflower wings, crispy smashed potatoes, and veggie tots, which were previously difficult to replicate through standard microwaving. The rapid growth of these appliance-specific stock-keeping units is driven by significant consumer spending and adoption of compatible formats. According to Conagra Brands' "Future of Frozen Food 2025" report from December 2024, sales of air fryer-friendly frozen foods have hit \$6.1 billion, highlighting the immense commercial viability of adapting vegetable formats for this specific cooking method.

Concurrently, the expansion of premium private label vegetable ranges is reshaping the competitive landscape as retailers shift from economy-tier products to high-quality, gourmet blends. Supermarkets are increasingly using their own brands to provide organic options and exclusive, chef-inspired vegetable medleys that compete directly with national incumbents based on quality rather than solely on price. This strategic move towards premiumization allows retailers to maintain higher margins while fostering consumer loyalty during economic fluctuations. This shift is demonstrated by strong category performance; the Private Label Manufacturers Association's "First-Half 2025 Private Label Report" notes that dollar sales for the frozen store brand department rose by 3.8% in the 52 weeks ending June 15, 2025, emphasizing the growing consumer preference for these retailer-owned lines.

Key Market Players

Kraft Foods

BRF S.A.

Astral Foods

Hormel Foods

2 Sisters Food

Waitrose

Wm Morrison Supermarkets Limited

Samworth Brothers

General Mills Inc

Conagra Brands, Inc

Report Scope

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

Frozen Vegetables Market, By Type

Beans

Corn

Peas

Mushroom

Cauliflower

Asparagus

Broccoli

Others

Frozen Vegetables Market, By Application

Food Service Industry

Retail Customers

Frozen Vegetables Market, By Distribution Channel

Supermarkets/Hypermarkets

Grocery Stores

Convenience Stores

Others

Frozen Vegetables 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 Vegetables Market.

Available Customizations:

Frozen Vegetables Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (...)

Global Frozen Vegetables 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL FROZEN VEGETABLES MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Type (Beans, Corn, Peas, Mushroom, Cauliflower, Asparagus, Broccoli, Others)
 - 5.2.2. By Application (Food Service Industry, Retail Customers)
 - 5.2.3. By Distribution Channel (Supermarkets/Hypermarkets, Grocery Stores,

Convenience Stores, Others)

5.2.4. By Region

5.2.5. By Company (2025)

5.3. Market Map

6. NORTH AMERICA FROZEN VEGETABLES MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Type

6.2.2. By Application

6.2.3. By Distribution Channel

6.2.4. By Country

6.3. North America: Country Analysis

6.3.1. United States Frozen Vegetables Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Type

6.3.1.2.2. By Application

6.3.1.2.3. By Distribution Channel

6.3.2. Canada Frozen Vegetables Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Type

6.3.2.2.2. By Application

6.3.2.2.3. By Distribution Channel

6.3.3. Mexico Frozen Vegetables Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Type

6.3.3.2.2. By Application

6.3.3.2.3. By Distribution Channel

7. EUROPE FROZEN VEGETABLES MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Type
 - 7.2.2. By Application
 - 7.2.3. By Distribution Channel
 - 7.2.4. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. Germany Frozen Vegetables Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Type
 - 7.3.1.2.2. By Application
 - 7.3.1.2.3. By Distribution Channel
 - 7.3.2. France Frozen Vegetables Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Type
 - 7.3.2.2.2. By Application
 - 7.3.2.2.3. By Distribution Channel
 - 7.3.3. United Kingdom Frozen Vegetables Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Type
 - 7.3.3.2.2. By Application
 - 7.3.3.2.3. By Distribution Channel
 - 7.3.4. Italy Frozen Vegetables Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Type
 - 7.3.4.2.2. By Application
 - 7.3.4.2.3. By Distribution Channel
 - 7.3.5. Spain Frozen Vegetables Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value

- 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Type
 - 7.3.5.2.2. By Application
 - 7.3.5.2.3. By Distribution Channel

8. ASIA PACIFIC FROZEN VEGETABLES MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Type
 - 8.2.2. By Application
 - 8.2.3. By Distribution Channel
 - 8.2.4. By Country
- 8.3. Asia Pacific: Country Analysis
 - 8.3.1. China Frozen Vegetables Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Type
 - 8.3.1.2.2. By Application
 - 8.3.1.2.3. By Distribution Channel
 - 8.3.2. India Frozen Vegetables Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Type
 - 8.3.2.2.2. By Application
 - 8.3.2.2.3. By Distribution Channel
 - 8.3.3. Japan Frozen Vegetables Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Type
 - 8.3.3.2.2. By Application
 - 8.3.3.2.3. By Distribution Channel
 - 8.3.4. South Korea Frozen Vegetables Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value

- 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Type
 - 8.3.4.2.2. By Application
 - 8.3.4.2.3. By Distribution Channel
- 8.3.5. Australia Frozen Vegetables Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Type
 - 8.3.5.2.2. By Application
 - 8.3.5.2.3. By Distribution Channel

9. MIDDLE EAST & AFRICA FROZEN VEGETABLES MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Type
 - 9.2.2. By Application
 - 9.2.3. By Distribution Channel
 - 9.2.4. By Country
- 9.3. Middle East & Africa: Country Analysis
 - 9.3.1. Saudi Arabia Frozen Vegetables Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Type
 - 9.3.1.2.2. By Application
 - 9.3.1.2.3. By Distribution Channel
 - 9.3.2. UAE Frozen Vegetables Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Type
 - 9.3.2.2.2. By Application
 - 9.3.2.2.3. By Distribution Channel
 - 9.3.3. South Africa Frozen Vegetables Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Type

9.3.3.2.2. By Application

9.3.3.2.3. By Distribution Channel

10. SOUTH AMERICA FROZEN VEGETABLES MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Type

10.2.2. By Application

10.2.3. By Distribution Channel

10.2.4. By Country

10.3. South America: Country Analysis

10.3.1. Brazil Frozen Vegetables Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Type

10.3.1.2.2. By Application

10.3.1.2.3. By Distribution Channel

10.3.2. Colombia Frozen Vegetables Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Type

10.3.2.2.2. By Application

10.3.2.2.3. By Distribution Channel

10.3.3. Argentina Frozen Vegetables Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Type

10.3.3.2.2. By Application

10.3.3.2.3. By Distribution Channel

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

13. GLOBAL FROZEN VEGETABLES MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

- 15.1. Kraft Foods
 - 15.1.1. Business Overview
 - 15.1.2. Products & Services
 - 15.1.3. Recent Developments
 - 15.1.4. Key Personnel
 - 15.1.5. SWOT Analysis
- 15.2. BRF S.A.
- 15.3. Astral Foods
- 15.4. Hormel Foods
- 15.5. 2 Sisters Food
- 15.6. Waitrose
- 15.7. Wm Morrison Supermarkets Limited
- 15.8. Samworth Brothers
- 15.9. General Mills Inc
- 15.10. Conagra Brands, Inc

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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