

Global Functional Flour Market - Focused Insights 2025-2030

Market Report | 2025-03-11 | 143 pages | Arizton Advisory & Intelligence

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Report description:

The global functional flour market is expected to grow at a CAGR of 7.63% from 2024 to 2030.

KEY TAKEAWAYS

- By Product: The specialty flour segment holds the largest market share of over 53%. The segment is growing as consumers are increasingly seeking products with recognizable ingredients and simple ingredients.
- By Source: The legume segment shows the highest growth of 8.17%. In the legumes segment, chickpeas, peas, lentils, beans, etc. are the key sources that are packed with nutrients, including fiber, protein, various minerals, and vitamins, thus helping segmental growth.
- By Application: The bakery & confectionery segment accounts for the largest market share as the functional flours are used to improve the taste & texture and enhance the nutritional flours of various products in bakery & confectionery.
- By End-User: The B2B segment holds the largest market share, it is driven by the rising prevalence of food intolerances & allergies and increasing demand for healthier food options.
- By Distribution Channel: The offline segment holds the largest market share, as they offer a wide variety of functional flours from various brands and have a huge stock.
- By Geography: North America holds the largest share of over 32% of the global functional flour market. The growth is attributed to a substantial gluten-intolerance population and a high prevalence of health-conscious consumers.
- Growth Factor: The global functional flour market is set to grow due to increasing demand for ready-to-eat products and rising health consciousness.

MARKET TRENDS

Growing Popularity of Clean Label Products

The clean label in functional flour means healthy ingredients, wholesome & natural, transparent, and minimally processed. It

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impacts product innovations, labeling & transparency, ingredient sourcing, premiumization, and marketing & communication. Food manufacturers are adopting functional flour to boost the creditability of their product labels. Brands are actively communicating with consumers effectively with their clean label efforts, by highlighting wholesome and natural aspects of their flours. With a wide range of delicious and diverse options readily available, the positive perception of consuming clean-label food products contributes to maintaining health. Consumers are seeking flour with recognizable ingredients. The manufacturers are responding to them with the development of innovative and new products.

Increased Use of Ancient Grains And Superfoods

Increased use of ancient grains and superfood products is a major trend in the global functional flour market driven by several factors including unique flavors & textures, gluten-free demand, health & wellness, sustainability, and product innovation. Ancient grains are grains that have remained largely unchanged over centuries like amaranth, teff, millet, spelt, etc. Superfoods are nutrient-rich foods with many health benefits often including ancient grains, but it also includes chia seeds, berries, and flaxseeds. Consumers are becoming health-conscious and seeking nutritious foods. Superfoods and ancient grains often pack more vitamins, fiber, minerals, and proteins than conventional grains.

MARKET DRIVERS

Increased Demand for Ready-to-Eat Products

The demand for ready-to-eat (RTE) products is growing significantly across the globe. This is driven by various factors, including busy lifestyles, health & wellness, allergen-friendly & gluten-free options, convenience, storage, variety, and working parents. Dual-income households and busy schedules lead to less time for meal preparation. The impact of the increased demand for ready-to-eat products includes market growth, product diversification, and innovation & partnerships. Modern lifestyles are increasingly busy. Thus, consumers are looking for convenient meal solutions, which require less preparation time. Functional flour plays a significant role in the creation of ready-to-eat products which are easy to quick to prepare.

Rising Health Consciousness

The rising health consciousness is growing significantly across the globe, driven by various factors, including increased awareness of dietary needs, the growing popularity of specific diets, a shift towards healthier lifestyles, a focus on digestive health, demand for clean-label products, and interest in plant-based diets. Consumers are becoming health-conscious and looking for nutritious food options. Functional flour gives additional nutritional value, such as fiber, vitamins, and protein. It makes them ideal for fortifying food. People are becoming more informed about the requirement of a balanced diet and specific nutrients for maintaining overall health. Functional flours offer a way to get proper nutrients into the day-to-day snacks and meals.

INDUSTRY RESTRAINTS

High Cost

The high cost of functional flour is a major challenge in the global functional flour market. It includes increased transportation costs, technology & processing costs, raw material costs, marketing & branding, research & development, and labor costs. Sourcing high-quality raw materials is expensive. The cost of ingredients, such as legumes, specialty seeds, ancient grains, etc. is on the rise due to global supply chain disruptions, climate change affecting crop yields, and increased demand for certain commodities. The cost of transportation, sourcing, and storing specialized ingredients can increase the overall cost of functional flour. Creating awareness and promotional activities of functional flours often require significant investment in the market, which can impact the products' final price.

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SEGMENTATION INSIGHTS

INSIGHTS BY PRODUCT

The global functional flour market by product is segmented into specialty flour, pre-cooked flour, and others. In 2024, the specialty flour segment dominates and holds the largest market share of over 53%. Specialty flours include gluten-free flours, fortified flours, flour blends, high-protein flours, and whole grains. Gluten-free flours are made from processed or naturally gluten-free sources to remove gluten, catering to individuals with gluten sensitivity or celiac disease. The demand for high-protein flours is rising due to their increased protein content. These flours, derived from nuts or legumes, appeal to those seeking protein-rich diets. Fortified flours are enriched with minerals, vitamins, or other nutrients to enhance their nutritional value. Specialty flours can improve the flavor, shelf life, and texture of baked goods. They also enhance dough handling properties, making it easier to work with. Food manufacturers and bakers are increasingly using specialty flours to develop innovative products that meet evolving consumer demands.

- By Product

- o Specialty Flour
- o Pre-Cooked Flour
- o Others

INSIGHTS BY SOURCE

The global functional flour market by source is categorized into cereals, legumes, and others. The legumes segment shows significant growth, with the fastest-growing CAGR of 8.17% during the forecast period. In the legumes segment, key sources include chickpeas, peas, lentils, and beans, which are packed with nutrients such as fiber, protein, various minerals, and vitamins. They are increasingly popular due to their high protein content, fiber-rich properties, gluten-free nature, versatility, and nutrient density. Legumes are widely used in various applications, including bakery and confectionery, snacks, breakfast cereals, protein bars, soups and sauces, and baby foods. The demand for legumes is growing significantly in the global functional flour market due to several factors, including the rising demand for gluten-free products, the growing preference for plant-based protein sources, increasing awareness of the health benefits of legumes, and ongoing innovations in product development.

- By Source

- o Cereals
- o Legumes
- o Others

INSIGHTS BY APPLICATION

Based on the application, the bakery & confectionery segment accounted for the largest share of the global functional flour market. The bakery and confectionery segment of functional flour includes a variety of functional flour such as coconut flour, oat flour, soy flour, rice flour, and almond flour. The demand for functional flour is rising significantly in the bakery and confectionery sector for making bread rolls, pastries, cakes, cookies, pies, and more. As health consciousness increases, the demand for functional flour in bakery and confectionery products is growing. Functional flours offer various health benefits, including improved digestibility, reduced risk of chronic diseases, and high fiber content, making them appealing to health-conscious consumers. The rising demand for functional flour is driven by several factors, including the growing preference for gluten-free products, the clean-label trend, increasing health awareness, product innovation, and the rising popularity of "better-for-you" foods.

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- By Application
- o□Bakery & Confectionery
- o□RTE Products
- o□Soups & Sauces
- o□Others

INSIGHTS BY END USER

Based on the end user, the B2B segment accounted for the largest market share of the global functional flour market. This is primarily due to the increased use of functional flour across various food processing industries. Ancient grain flours, high-protein flours, and gluten-free flours offer various functional and nutritional benefits over conventional flours. With rising health awareness, consumers are seeking healthier food choices, driving the demand for functional flour in the B2B segment. In bakeries, functional flours are used to enhance shelf life, improve the nutritional profile, and refine the texture of baked goods such as cakes, pastries, and bread. Quick-service restaurants incorporate functional flour-based food options, providing cost-effective solutions for various businesses. Additionally, the growing number of hotels and restaurants worldwide is expected to further drive the demand for functional flours during the forecast period.

By End-User

- B2B
- B2C

INSIGHTS BY DISTRIBUTION CHANNEL

The global functional flour market by distribution channel is segmented into offline and online. The offline segment accounted for the largest market share in 2024. Supermarkets and hypermarkets are the major players in the offline store distribution channel, offering a wide variety of functional flours from various brands. They also maintain a large stock of popular options such as coconut flour, gluten-free flour, and almond flour. These stores serve as ideal platforms for selling and showcasing functional flour products. Offline stores provide several advantages, including a tangible shopping experience, expert advice, product discovery, immediate gratification, and impulse purchases. Europe has the highest number of supermarkets and hypermarkets globally, followed by North America. Despite the higher price point, there is a growing demand for convenient functional flour options among individuals leading busy lifestyles. Additionally, despite space constraints, convenience stores are focusing on offering well-packaged and quick-selling options to meet market demand.

By Distribution Channel

- Offline
- Online

GEOGRAPHICAL ANALYSIS

North America dominates and holds the largest share of over 32% in the global functional flour market. The growth is attributed to a substantial gluten-intolerant population and a high prevalence of health-conscious consumers. The U.S. and Canada are major markets in North America, contributing significantly to the global functional flour market. The rising demand for bakery and confectionery items, along with the increasing consumption of ready-to-eat products across North America, is driving the demand for functional flour during the forecast period. With a wide range of delicious and nutritious options readily available, the increasing acceptance of functional flour plays a key role in promoting better health. Additionally, the growing availability of diverse functional flours, continuous product innovations, and positive consumer perception are further expanding market reach.

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By Geography

- North America
 - o□US
 - o□Canada
- Europe
 - o□Germany
 - o□UK
 - o□France
 - o□Spain
 - o□Italy
- APAC
 - o□China
 - o□India
 - o□Japan
 - o□South Korea
 - o□Australia
- Latin America
 - o□Brazil
 - o□Mexico
- Middle East & Africa
 - o□Turkey
 - o□South Africa
 - o□Saudi Arabia

COMPETITIVE LANDSCAPE

The global functional flour market report consists of exclusive data on 27 vendors. The market is dynamic and competitive among players. It is characterized by a mix of emerging brands, regional players, and established multinational companies. Companies in this market are continuously focusing on acquisitions, partnerships, and mergers to expand the market reach. The year-on-year acquisitions in this market are rising significantly. The companies in this market are focusing on offering locally sourced nutritional ingredients-based functional flour to gain traction in the market. Companies are investing more in R&D to create new functional flours with improved texture, taste, and nutritional profiles. Several players are projected to extend their presence globally throughout the projection period to capture a greater market share, particularly in the fast-developing countries in APAC.

Key Vendors

- Associated British Foods plc
- Bunge Limited
- Cargill
- Incorporated
- General Mills, Inc.
- Ingredion Incorporated

Other Prominent Vendors

- AGRANA Beteiligungs-AG

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- []GEMEF INDUSTRIES
- []Gisto's
- []ITC Limited
- []Limagrain
- []Maticnjak
- []Parrish & Heimbecker
- []Shipton Mill Limited
- []SunOpta Inc.
- []Cairolì Group
- []The Hain Celestial Group, Inc.
- []The Scoular Company
- []Unicorn Specialty Flours
- []Bob's Red Mill
- []Dr. Schar AG / SPA
- []Ulrick & Short Limited
- []Gruma Corporation
- []Namaste Foods
- []SILESIAN Flour Sp. z o.o.
- []King Arthur Baking Company, Inc.
- []ConAgra Brands, Inc.

KEY QUESTIONS ANSWERED:

- 1.[]Which source segment provides more business opportunities in the global functional flour market?
- 2.[]How big is the global functional flour market?
- 3.[]Which product segment has the largest share in the global functional flour market?
- 4.[]Which region holds the largest share in the global functional flour market?
- 5.[]Who are the major players in the global functional flour market?

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