

Frozen Bread - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 130 pages | Mordor Intelligence

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Report description:

Frozen Bread Market Analysis

The frozen bread market is expected to grow from USD 8.72 billion in 2025 to USD 9.14 billion in 2026 and is forecast to reach USD 11.56 billion by 2031 at 4.81% CAGR over 2026-2031. This growth is primarily driven by increasing consumer demand, particularly among dual-income urban households, for products that offer long shelf life, convenience in preparation, and consistent quality. Technological advancements, especially the adoption of isochoric freezing processes, are playing a pivotal role in overcoming traditional challenges related to texture and flavor. These processes not only minimize ice crystallization but also significantly reduce energy consumption, making them both effective and sustainable. Europe currently dominates the market in terms of revenue, benefiting from a well-established frozen food infrastructure and high consumer acceptance. However, the Asia-Pacific region is emerging as a key growth area, fueled by rapid urbanization, rising disposable incomes, and changing dietary preferences. Retailers are actively enhancing product visibility and accessibility through a strong off-trade presence, such as supermarkets and hypermarkets, which remain the primary distribution channels.

Global Frozen Bread Market Trends and Insights

Rising demand for convenience foods

The rising demand for convenience foods is a significant driver in the frozen bread market. Consumers increasingly prefer ready-to-eat or easy-to-prepare food options due to their busy lifestyles and the growing need for time-saving solutions. Frozen

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bread offers a convenient alternative to freshly baked bread, as it requires minimal preparation while maintaining quality and taste. Additionally, advancements in freezing technology have improved the shelf life and nutritional value of frozen bread, further boosting its appeal among consumers. This trend is particularly prominent in urban areas, where hectic schedules and dual-income households drive the demand for convenient food products. Furthermore, the increasing penetration of modern retail formats, such as supermarkets and hypermarkets, has made frozen bread more accessible to consumers. These retail outlets often feature dedicated frozen food sections, allowing consumers to explore a wide variety of frozen bread options. The growing influence of Western food habits in developing regions has also contributed to the rising popularity of frozen bread, as consumers seek products that align with their evolving dietary preferences.

Rapid urbanization driving packaged bread adoption

Rapid urbanization is significantly driving the adoption of packaged bread in the frozen bread market. As urban areas expand and populations grow, there is an increasing demand for convenient and ready-to-eat food products. Packaged frozen bread caters to the fast-paced lifestyles of urban consumers by offering a quick and easy solution for meals. Additionally, the rise in dual-income households in urban regions has further amplified the need for time-saving food options, making frozen bread a preferred choice. The availability of diverse bread varieties and improved storage technologies also contribute to the growing popularity of packaged frozen bread in urban markets. Urbanization in Asia is significantly transforming bread consumption habits. As per a UN-Habitat report, Asia is home to 54% of the world's urban population, translating to over 2.2 billion individuals. Projections indicate that by 2050, Asia's urban population will swell by another 1.2 billion, marking a 50% increase. Moreover, modern retail formats, such as supermarkets and convenience stores, along with advancements in cold chain infrastructure, are playing a crucial role in this growth.

Cold-chain gaps limiting distribution

The frozen bread market faces a significant restraint due to gaps in the cold-chain infrastructure. These gaps hinder the efficient distribution of frozen bread products, particularly in regions with inadequate refrigeration and storage facilities. ASEAN countries, in particular, require substantial investment in cold-chain infrastructure and human resource development to support the growth of the frozen food market. Government policies in these regions are increasingly focusing on infrastructure development and providing support to small and medium enterprises (SMEs). However, temperature control failures within the cold chain often result in product spoilage and safety concerns, which undermine consumer confidence in the quality of frozen bread. This further limits market penetration in areas with insufficient cold-chain infrastructure. Addressing these challenges is crucial for ensuring the seamless delivery of frozen bread products to end consumers while maintaining product quality and safety.

Other drivers and restraints analyzed in the detailed report include:

Expansion of artisanal in-store bakeries
Technological advancements in freezing
Home-baking appliance adoption rises

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Leavened bread retains its commanding position in the frozen bread market, holding a substantial market share of 57.86% in 2025. This dominance is largely due to consumer familiarity and the well-established distribution networks that support its widespread availability across global markets. Consumers generally prefer leavened bread varieties because of their texture, taste, and the traditional role they play in many dietary cultures. The robustness of the supply chain for leavened bread products, along with extensive retail presence, further reinforces its leadership. Major players focus on maintaining product quality and innovating within the leavened segment to meet varying regional tastes and preferences. This segment continues to benefit from

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frequent household consumption, retail prominence, and strong brand loyalty, securing its leading market share in the frozen bread category.

Conversely, unleavened bread is emerging as the fastest-growing segment in the frozen bread market, projected to grow at a strong CAGR of 5.06% through 2031. The growth momentum of unleavened varieties is primarily driven by an increasing number of health-conscious consumers who seek lower-calorie and lower-carb alternatives to traditional bread. Additionally, cultural dietary preferences and the rising popularity of ethnic foods are contributing to the expanding demand for unleavened bread products, which are often staples in specific ethnic cuisines. Manufacturers are responding by introducing unleavened frozen bread options that cater to these dietary needs, including gluten-free and organic variants. The segment's expansion is also supported by innovative packaging and extended shelf life, enhancing convenience for consumers. With the growing trend toward healthier eating and diversified food preferences, unleavened bread is rapidly gaining traction in both retail and foodservice channels.

White bread commands a dominant position in the frozen bread market, holding a significant market share of 59.63% in 2025. This leadership status is underpinned by decades of established consumer preference, driven by familiarity, taste, and affordability. White bread's production benefits from cost-effective manufacturing processes and wide availability, making it a staple product in various retail and foodservice channels worldwide. Manufacturers maintain robust distribution networks that ensure consistent product supply and accessibility. Additionally, continuous product improvements and innovations, such as fortified and clean-label white bread, help sustain consumer interest and loyalty. This widespread acceptance, together with competitive pricing, ensures white bread remains the backbone of the frozen bread market segment globally.

On the other hand, multi-grain bread stands out as the fastest-growing segment in the frozen bread market, projected to grow at a CAGR of 5.73% through 2031. Consumers are increasingly choosing multi-grain bread for its perceived nutritional benefits, such as higher fiber, protein, and micronutrient content compared to white bread. Demand for artisanal-style frozen breads, including seeded and rye-based multi-grain options, is rising as consumers seek gourmet experiences at home. In addition, restaurants, cafes, and institutional buyers increasingly rely on frozen multi-grain bread for consistency and cost efficiency. Rising popularity of breads with chia, flax, sunflower, and pumpkin seeds, marketed as "superfood" options.

The Frozen Bread Market Report is Segmented by Product Type (Leavened Bread, Unleavened Bread), Ingredient Type (Wheat Bread, Rye Bread, Multigrain Bread, Other Ingredients), Nature (Conventional Bread, Free-From Bread), Distribution Channel (On-Trade, Off-Trade), and Geography (North America, Europe, Asia-Pacific, South America, Middle-East and Africa). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

In 2025, North America commands a 48.05% share of the market, thanks to its sophisticated retail infrastructure and the established consumer acceptance of frozen convenience products. The continent's diverse national markets, each with its own bread consumption traditions, further bolster this leadership. Advanced cold chain logistics networks in North America play a crucial role, ensuring product quality from production to consumption. This addresses past consumer concerns regarding the texture and taste of frozen bread. Moreover, regulatory harmonization across North America markets not only streamlines cross-border distribution but also allows manufacturers operating in multiple countries to achieve economies of scale. Yet, North America growth is tempered by market maturity and fierce competition between frozen and fresh bakery products, where artisanal baking holds strong traditions.

Asia-Pacific is on track to be the fastest-growing region, boasting a 6.65% CAGR through 2031. This surge is driven by significant demographic and economic shifts, leading to a growing acceptance of frozen bread. Urbanization in China, India, and Southeast Asian nations is birthing consumer segments that favor convenient meal solutions, often mirroring Western dietary trends. As

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disposable incomes rise, consumers are more inclined to opt for premium products. Furthermore, with many households now having dual incomes, there's a pronounced preference for time-saving food options. However, the region's ambitious growth is not without challenges. Infrastructure hurdles, especially in cold chain logistics and rural distribution, loom large. Yet, bolstered by government investments in food safety and supply chain upgrades, the market is poised for development. It's worth noting that Asia-Pacific's diverse markets have distinct dietary preferences. This necessitates tailored product development and marketing strategies that honor traditional food customs while promoting the advantages of frozen bread.

Europe, South America, and the Middle East and Africa are witnessing moderate growth, each shaped by its unique market dynamics and developmental stages. In Europe, a mature market landscape leans heavily on product innovation and premium positioning. Here, manufacturers are increasingly turning to health-conscious formulations and specialty ingredients to keep consumers engaged. South America's growth trajectory is closely tied to its economic stability and the evolution of its infrastructure. This is especially true for cold storage and distribution networks, which are vital for the penetration of frozen products. Meanwhile, the Middle East and Africa present a landscape ripe for expansion. As urbanization picks up pace and retail modernization takes root, the potential is evident. However, challenges like political instability and economic volatility cast shadows, posing investment risks for global manufacturers. Across all these regions, trade agreements and efforts to harmonize food safety standards are paving the way for smoother market access. Yet, the looming specter of climate change, with its repercussions on agriculture and food distribution, demands that all players adopt flexible and adaptive strategies.

List of Companies Covered in this Report:

Grupo Bimbo S.A.B. de C.V. Aryzta AG Europastry S.A. General Mills Inc. Associated British Foods plc (ABF) Lantmannen Unibake International Flower Foods Inc. The Campbell's Company Vandemoortele NV Conagra Brands Inc. Maple Leaf Foods Inc. Bridgford Foods Corp. Sunbulah Group Almarai Co. Dawn Food Products Inc. Atyab Food Industries Emad Bakeries Warburtons Ltd. Weston Foods (Fleischmann's) Gonnella Baking Co.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Market Drivers

4.2.1 Rising demand for convenience foods

4.2.2 Rapid urbanization driving packaged bread adoption

4.2.3 Expansion of artisanal in-store bakeries

4.2.4 E-commerce penetration increasing direct-to-consumer frozen bread sales

4.2.5 Technological advancements in freezing

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- 4.2.6 Product innovation and diversification
- 4.3 Market Restraints
 - 4.3.1 Cold-chain gaps limiting distribution
 - 4.3.2 Home-baking appliance adoption rises
 - 4.3.3 Raw material price fluctuations
 - 4.3.4 Competition from fresh bakery products
- 4.4 Value / Supply-Chain Analysis
- 4.5 Regulatory Landscape
- 4.6 Technological Outlook
- 4.7 Porter's Five Forces Analysis
 - 4.7.1 Bargaining Power of Buyers/Consumers
 - 4.7.2 Bargaining Power of Suppliers
 - 4.7.3 Threat of New Entrants
 - 4.7.4 Threat of Substitute Products
 - 4.7.5 Intensity of Competitive Rivalry

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

- 5.1 By Product Type
 - 5.1.1 Leavened Bread
 - 5.1.2 Unleavened Bread
- 5.2 By Ingredient Type
 - 5.2.1 Wheat Bread
 - 5.2.2 Rye Bread
 - 5.2.3 Multigrain Bread
 - 5.2.4 Other Ingredients
- 5.3 By Nature
 - 5.3.1 Conventional Bread
 - 5.3.2 Free-From Bread
- 5.4 By Distribution Channel
 - 5.4.1 On-Trade
 - 5.4.2.1 Supermarkets/Hypermarkets
 - 5.4.2.2 Convenience Stores
 - 5.4.2.3 Online Retail Stores
 - 5.4.2.4 Other Distribution Channels
 - 5.4.2 Off-Trade
- 5.5 Geography
 - 5.5.1 North America
 - 5.5.1.1 United States
 - 5.5.1.2 Canada
 - 5.5.1.3 Mexico
 - 5.5.1.4 Rest of North America
 - 5.5.2 Europe
 - 5.5.2.1 Germany
 - 5.5.2.2 United Kingdom
 - 5.5.2.3 France
 - 5.5.2.4 Italy
 - 5.5.2.5 Spain

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- 5.5.2.6 Netherlands
- 5.5.2.7 Sweden
- 5.5.2.8 Poland
- 5.5.2.9 Belgium
- 5.5.2.10 Rest of Europe
- 5.5.3 Asia-Pacific
- 5.5.3.1 India
- 5.5.3.2 China
- 5.5.3.3 Australia
- 5.5.3.4 South Korea
- 5.5.3.5 Japan
- 5.5.3.6 Rest of Asia-Pacific
- 5.5.4 South America
- 5.5.4.1 Brazil
- 5.5.4.2 Argentina
- 5.5.4.3 Rest of South America
- 5.5.5 Middle-East and Africa
- 5.5.5.1 United Arab Emirates
- 5.5.5.2 Saudi Arabia
- 5.5.5.3 South Africa
- 5.5.5.4 Rest of Middle-East and Africa

6 COMPETITIVE LANDSCAPE

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (includes Global Overview, Market-level Overview, Core Segments, Financials, Strategic Information, Market Rank/Share, Products & Services, Recent Developments)

6.4.1 Grupo Bimbo S.A.B. de C.V.

6.4.2 Aryzta AG

6.4.3 Europastry S.A.

6.4.4 General Mills Inc.

6.4.5 Associated British Foods plc (ABF)

6.4.6 Lantmannen Unibake International

6.4.7 Flower Foods Inc.

6.4.8 The Campbell's Company

6.4.9 Vandemoortele NV

6.4.10 Conagra Brands Inc.

6.4.11 Maple Leaf Foods Inc.

6.4.12 Bridgford Foods Corp.

6.4.13 Sunbula Group

6.4.14 Almarai Co.

6.4.15 Dawn Food Products Inc.

6.4.16 Atyab Food Industries

6.4.17 Emad Bakeries

6.4.18 Warburtons Ltd.

6.4.19 Weston Foods (Fleischmann's)

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6.4.20 Gonnella Baking Co.

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

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