

## **Pastries - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

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### **Report description:**

Pastries Market Analysis

Pastries market size in 2026 is estimated at USD 43.76 billion, growing from 2025 value of USD 42.12 billion with 2031 projections showing USD 52.97 billion, growing at 3.9% CAGR over 2026-2031. The moderate expansion reflects balanced growth drivers: premiumization, clean-label reformulation, and convenience demand offsetting raw-material cost inflation. Retail remains the mainstay as 69.70% of global value flows through supermarkets, hypermarkets, convenience stores, and e-commerce, yet foodservice is regaining momentum as pandemic disruptions fade. Europe leads the pastries market with 39.60% share, thanks to strong artisanal traditions, while Asia-Pacific's 8.56% CAGR signals rising urban incomes and Western dietary adoption. Technology now underpins competitive advantage; artificial-intelligence systems already cut bakery waste, helping manufacturers protect margins amid volatile egg, cocoa, and sugar prices. Consolidation is accelerating as global players pursue scale and health-centric capabilities, highlighted by Mars's USD 35.9 billion acquisition of Kellanova in 2024 and Flowers Foods's USD 795 million purchase of Simple Mills in January 2025.

Global Pastries Market Trends and Insights

Growing demand for convenient, ready-to-eat, and frozen pastry products

Consumer lifestyle acceleration has fundamentally shifted purchasing patterns toward convenience-oriented pastry solutions, with frozen bakery products experiencing robust demand due to the extended shelf life capabilities of 6-18 months without

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preservatives. Post-COVID consumer behavior reinforced trust in frozen products' safety and hygiene standards, while technological advances in production methods, including unfermented, pre-fermented, par-baked, fully baked, and thaw-and-serve processes, enable manufacturers to cater to diverse preparation preferences. Regulatory compliance frameworks like the FDA's FSMA preventive controls enhance consumer confidence in frozen pastry safety and traceability. In addition, frozen and RTE pastries offer significant convenience and have a much longer shelf life (6-18 months) compared to fresh products, which helps reduce food waste for both consumers and businesses. This longevity allows consumers to stock up and enjoy pastries at their leisure. For instance, according to the Department for Environment, Food and Rural Affairs, in 2022/2023, an average of 95 pence per person per week was spent on cakes, buns, and pastries in the United Kingdom. Moreover, delivery preferences have intensified, with 30% of consumers now favoring delivery for sweet baked goods, while grab-and-go products surged 50% as convenience becomes paramount.

#### Rising popularity of premium, artisanal, and gourmet pastries

The premiumization trend has transformed pastry consumption from commodity to experiential indulgence, with Sydney's bakery landscape exemplifying this shift through new artisan establishments opening every two weeks in 2024. Innovative pastries like chocolate bar croissants and miso-glazed Portuguese tarts command premium pricing despite quick sellouts, reflecting consumers' willingness to pay for craftsmanship and unique flavor profiles. This evolution extends beyond traditional offerings to include twice-baked croissants, loaded flatbreads, Basque cheesecake, kouign-amann, and croissant-shell tarts, showcasing creativity and technical expertise. The trend aligns with "affordable luxury" psychology during economic uncertainty, where consumers seek small indulgences as emotional comfort. Moreover, culinary fusion has emerged as a defining characteristic, with pastries incorporating cocktail-inspired flavors, exotic citrus fruits, vinegars, fermented products, and spice combinations that stimulate multiple senses. European markets particularly embrace this trend, with EMEA's cakes and pastries segment representing prominent growth, driven by consumer demand for extraordinary experiences and visual appeal.

#### Rising input and raw material costs

In 2024, egg prices in the U.S. jumped to USD 4.15 per dozen, up from USD 2.51 in 2023, as reported by the Bureau of Labor Statistics. This surge, with forecasts of further increases in 2025, was attributed to supply chain disruptions, avian flu outbreaks, and industry consolidation. Meanwhile, in India, the Office of the Economic Adviser noted that the Wholesale Price Index for eggs, meat, and fish hit around 172 in the financial year 2024, marking a consistent rise since 2013. Cocoa prices soared to crisis levels, nearing USD 10,000 per metric ton, due to adverse weather in West Africa, with the International Cocoa Organization warning of significant production deficits. Sugar prices reached their highest since 2011, with the FAO noting a 0.8% monthly uptick in the Sugar Price Index, driven by climate change's impact on EU sugar beet crops and Brazilian sugar cane production. U.S. bakeries grappled with new tariffs, escalating costs by 25-35% on essential ingredients. In 2024, the U.S. imported USD 977 million from Canada, USD 679 million from Mexico, and USD 395 million from China. Compounding these challenges, labor shortages led to wage inflation in the baking industry, as documented by the U.S. Bureau of Labor Statistics, pushing production costs higher.

Other drivers and restraints analyzed in the detailed report include:

Emergence of clean-label and specialty diet products  
Flavor innovation and localization  
Health concerns over sugar and additives

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

#### Segment Analysis

Packaged pastries commanded 61.72% market share in 2025, reflecting consumer preferences for convenience, extended shelf life, and portion control in increasingly busy lifestyles. This dominance stems from packaged products' superior distribution

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capabilities, enabling manufacturers to reach diverse retail channels while maintaining product integrity and food safety standards. However, unpackaged pastries are experiencing remarkable growth at 6.05% CAGR through 2031, driven by the artisanal movement and consumers' desire for fresh, customizable experiences that packaged alternatives cannot replicate.

The unpackaged segment benefits from the premiumization trend, with artisan bakeries commanding higher margins through craft positioning and local sourcing narratives. Technological innovations are blurring traditional boundaries, with modified atmosphere packaging and smart packaging solutions extending unpackaged pastries' viability while preserving their fresh appeal. Individual wrapping within the packaged segment has gained particular traction, addressing hygiene concerns while maintaining convenience benefits. The foodservice channel increasingly favors unpackaged options for customization capabilities, while retail environments continue gravitating toward packaged solutions for operational efficiency. Regulatory frameworks like the FDA's FSMA preventive controls apply more stringent requirements to packaged products, creating compliance advantages for established manufacturers with robust quality systems.

The Pastries Market is Segmented by Product Type (Packaged Pastries and Unpackaged Pastries), Packaging Type (Single-Serve and Multipack), Distribution Channel (Foodservice (Restaurants, Hotels, and Catering) and Retail (Supermarkets/Hypermarkets, Convenience Stores, Online Retail Stores, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

### Geography Analysis

Europe's pastries market leadership rests on a 39.22% revenue share in 2025, anchored by centuries-old patisserie culture and consumer willingness to pay premiums for provenance and craftsmanship. The broader EMEA bakery segment has been growing despite tightened environmental and sugar-reduction rules, accelerated recipe innovation, and sustainable packaging adoption. Energy-cost inflation and post-Brexit supply-chain recalibration remain operational challenges but also spur regional sourcing initiatives that reinforce local authenticity narratives.

Asia-Pacific delivers the fastest pastries market CAGR at 8.21%, propelled by urbanization, rising household incomes, and social-media-driven taste experimentation. China's snack-food sector is on the growth curve, making localized red-bean croissants and mango-filled Danish staples for Gen Z consumers. India's middle class multiplies pastry sales as Western-style cafes expand beyond Tier 1 cities, while Southeast Asian markets incorporate pandan, durian, and ube into laminated dough products. Regulatory diversity compels tailored labeling and fortification strategies across countries.

North America records measured growth as premium, clean-label, and single-serve innovations offset mature category volumes. Mexico's integration within USMCA supply networks yields raw-material cost advantages, though recent U.S. tariffs inject uncertainty. Canadian markets emphasize organic certification and bilingual labeling that increase compliance costs but enable premium positioning. The Middle East and Africa remain nascent yet promising; the UAE and South Africa anchor investment thanks to tourism, expat populations, and rising modern retail penetration. Infrastructure gaps and currency volatility restrain wider regional uptake for now.

### List of Companies Covered in this Report:

Grupo Bimbo Aryzta AG Flowers Foods Finsbury Food Group PLC Hostess Brands Tyson Foods (Hillshire Brands) Europastry S.A. Dawn Foods Mondelez International (LU) Britannia Industries McKee Foods Yamazaki Baking Co. Campbell Soup (Pepperidge Farm) General Mills (Pillsbury) Lantmannen Unibake Barilla Group (Mulino Bianco) Patisserie Valerie Rich Products Corporation Monginis Foods Pvt. PT Nippon Indosari (Sari Roti) The Cheesecake Factory Bakery

### Additional Benefits:

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<ul> The market estimate (ME) sheet in Excel format  
3 months of analyst support </ul>

## **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 Growing demand for convenient, ready-to-eat, and frozen pastry products

4.2.2 Rising popularity of premium, artisanal, and gourmet pastries

4.2.3 Emergence of clean-label and specialty diet products

4.2.4 Flavor innovation and localization

4.2.5 Technological advancements in baking and preservation

4.2.6 Increased focus on sustainability and ethical sourcing

4.3 Market Restraints

4.3.1 Rising input and raw material costs

4.3.2 Health concerns over sugar and additives

4.3.3 Growing competition across market segments

4.3.4 Regulatory uncertainty and compliance complexity

4.4 Supply-Chain Analysis

4.5 Regulatory Landscape

4.6 Technological Outlook

4.7 Porter's Five Forces

4.7.1 Threat of New Entrants

4.7.2 Bargaining Power of Buyers

4.7.3 Bargaining Power of Suppliers

4.7.4 Threat of Substitutes

4.7.5 Threat of Competitive Rivalry

### 5 MARKET SIZE AND GROWTH FORECASTS

5.1 By Product Type

5.1.1 Packaged Pastries

5.1.2 Unpackaged Pastries

5.2 By Packaging Type

5.2.1 Single-serve

5.2.2 Multipack

5.3 By Distribution Channel

5.3.1 Foodservice

5.3.1.1 Restaurants

5.3.1.2 Hotels

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- 5.3.1.3 Catering
- 5.3.2 Retail
  - 5.3.2.1 Supermarkets/Hypermarkets
  - 5.3.2.2 Convenience Stores
  - 5.3.2.3 Online Retail Stores
  - 5.3.2.4 Other Retail Channels
- 5.4 By Geography
  - 5.4.1 North America
    - 5.4.1.1 United States
    - 5.4.1.2 Canada
    - 5.4.1.3 Mexico
    - 5.4.1.4 Rest of North America
  - 5.4.2 South America
    - 5.4.2.1 Brazil
    - 5.4.2.2 Argentina
    - 5.4.2.3 Colombia
    - 5.4.2.4 Chile
    - 5.4.2.5 Rest of South America
  - 5.4.3 Europe
    - 5.4.3.1 United Kingdom
    - 5.4.3.2 Germany
    - 5.4.3.3 France
    - 5.4.3.4 Italy
    - 5.4.3.5 Spain
    - 5.4.3.6 Russia
    - 5.4.3.7 Sweden
    - 5.4.3.8 Belgium
    - 5.4.3.9 Poland
    - 5.4.3.10 Netherlands
    - 5.4.3.11 Rest of Europe
  - 5.4.4 Asia-Pacific
    - 5.4.4.1 China
    - 5.4.4.2 Japan
    - 5.4.4.3 India
    - 5.4.4.4 Thailand
    - 5.4.4.5 Singapore
    - 5.4.4.6 Indonesia
    - 5.4.4.7 South Korea
    - 5.4.4.8 Australia
    - 5.4.4.9 New Zealand
    - 5.4.4.10 Rest of Asia-Pacific
  - 5.4.5 Middle East and Africa
    - 5.4.5.1 United Arab Emirates
    - 5.4.5.2 South Africa
    - 5.4.5.3 Saudi Arabia
    - 5.4.5.4 Nigeria
    - 5.4.5.5 Egypt

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- 5.4.5.6 Morocco
- 5.4.5.7 Turkey
- 5.4.5.8 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 level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)

#### 6.4.1 Grupo Bimbo

#### 6.4.2 Aryzta AG

#### 6.4.3 Flowers Foods

#### 6.4.4 Finsbury Food Group PLC

#### 6.4.5 Hostess Brands

#### 6.4.6 Tyson Foods (Hillshire Brands)

#### 6.4.7 Europastry S.A.

#### 6.4.8 Dawn Foods

#### 6.4.9 Mondelez International (LU)

#### 6.4.10 Britannia Industries

#### 6.4.11 McKee Foods

#### 6.4.12 Yamazaki Baking Co.

#### 6.4.13 Campbell Soup (Pepperidge Farm)

#### 6.4.14 General Mills (Pillsbury)

#### 6.4.15 Lantmannen Unibake

#### 6.4.16 Barilla Group (Mulino Bianco)

#### 6.4.17 Patisserie Valerie

#### 6.4.18 Rich Products Corporation

#### 6.4.19 Monginis Foods Pvt.

#### 6.4.20 PT Nippon Indosari (Sari Roti)

#### 6.4.21 The Cheesecake Factory Bakery

## 7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

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