

Vertical Farming System & Module Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

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Abstracts

Vertical Farming System & Module Market Summary

Introduction

Vertical farming systems and modules are cutting-edge agricultural frameworks that employ vertically stacked growing units to produce crops in controlled environments, primarily for vegetable cultivation, fruit planting, and other applications. These systems utilize advanced technologies such as hydroponics, aeroponics, and other soil-less methods to optimize space, reduce water consumption, and ensure consistent crop production regardless of external weather conditions. The industry is distinguished by its sustainability, resource efficiency, and adaptability to urban settings, addressing critical challenges like land scarcity, water shortages, and food supply chain disruptions. It caters to the escalating demand for fresh, locally sourced produce, driven by urbanization, environmental concerns, and innovations in farming technology. Key growth factors include rising global food demand, shrinking arable land, and a growing preference for eco-conscious agricultural practices.

Market Size and Growth Forecast

The global vertical farming system and module market is estimated to reach USD 5.1 to 7.8 billion in 2025, with a projected compound annual growth rate (CAGR) of 8.0% to 9.0% from 2025 to 2030. This growth is driven by the rapid expansion of urban agriculture and the increasing adoption of water-efficient farming solutions.

Regional Analysis

North America: Holds 35-40% market share, with a growth rate of 7-8%. The United

States leads with indoor hydroponic systems for urban markets, while Canada focuses on technology-driven fruit cultivation.

Europe: Accounts for 30-35% market share, with a growth rate of 8-9%. Germany and the Netherlands drive demand with sustainable vegetable production and advanced farming modules.

Asia Pacific: Represents 20-25% market share, with a growth rate of 9-10%. China addresses water scarcity with large-scale systems, and Japan pioneers high-tech urban farming.

Rest of the World: Holds 5-10% market share, growing at 8-9%, with the UAE emphasizing food security through vertical farming innovations in arid regions.

Trends in North America focus on premium, local produce, while Asia Pacific prioritizes scalable systems to mitigate resource constraints.

Application Analysis

Vegetable cultivation grows at 8-9%, driven by demand for leafy greens and herbs, with trends toward hydroponics for consistent urban supply. Fruit planting grows at 7-8%, fueled by high-value crops like strawberries, with trends toward aeroponics in controlled environments. Other applications, including herbs and specialty crops, grow at 6-7%, with steady demand for niche produce in diverse markets.

Product Type Analysis

Hydroponics grows at 8-9%, valued for its water efficiency and soil-less cultivation, with trends toward widespread use in vegetable production. Aeroponics grows at 8-9%, leveraging minimal water for high yields, with trends toward adoption in fruit and premium crop farming. Others, such as aquaponics and hybrid systems, grow at 7-8%, with trends toward integrated solutions in sustainable farming setups.

Key Market Players

AeroFarms: Based in Newark, New Jersey, AeroFarms is a trailblazer in aeroponic vertical farming. The company operates large indoor facilities using mist-based systems to grow leafy greens with up to 99% less water than traditional methods, serving urban retailers and food service providers across North America with sustainable, high-quality produce.

Gotham Greens: Headquartered in Brooklyn, New York, Gotham Greens builds rooftop and indoor vertical farms using hydroponics. It specializes in pesticide-free greens like lettuce and basil, supplying major U.S. retailers and restaurants with a focus on local distribution and environmental sustainability.

Plenty (Bright Farms): Operating from San Francisco, California, Plenty develops high-tech indoor farms with advanced hydroponics and aeroponics. The company targets premium vegetable and fruit markets, emphasizing automation and data-driven farming

to deliver fresh produce to urban consumers in North America and beyond.

Lufa Farms: Located in Montreal, Canada, Lufa Farms pioneered rooftop vertical farming with hydroponic systems. It grows vegetables and herbs for direct-to-consumer delivery through a subscription model, focusing on urban freshness and reduced carbon footprints in the Canadian market.

Beijing IEDA Protected Horticulture: Based in China, Beijing IEDA designs vertical farming modules for vegetable cultivation. The company integrates hydroponics and automation to address urban food needs, serving China's growing cities with scalable, efficient systems.

Green Sense Farms: Headquartered in Indiana, USA, Green Sense Farms focuses on indoor hydroponic farming with energy-efficient LED lighting. It produces greens for retail and institutional buyers, offering scalable solutions for North American farmers seeking sustainable production methods.

Garden Fresh Farms: Located in Minnesota, USA, Garden Fresh Farms specializes in compact hydroponic systems for indoor vegetable farming. The company caters to local supermarkets and restaurants, emphasizing affordability and year-round production in urban settings.

Mirai: Based in Japan, Mirai develops advanced vertical farming systems using hydroponics and controlled environments. It grows leafy greens for urban markets, leveraging precision technology to address Japan's land scarcity and food security challenges.

Sky Vegetables: Operating from New York, USA, Sky Vegetables focuses on hydroponic vertical farms for vegetables. The company designs modular systems for urban rooftops, serving local markets with fresh, sustainable produce tailored to city needs.

TruLeaf: Headquartered in Nova Scotia, Canada, TruLeaf offers hydroponic vertical farming solutions for greens and herbs. It targets urban and remote markets with compact, high-yield systems, emphasizing sustainability and local food supply.

Urban Crops: Based in Belgium, Urban Crops develops automated hydroponic and aeroponic systems. The company serves European markets with high-tech farming modules, focusing on scalability and resource efficiency for urban agriculture.

Sky Greens: Located in Singapore, Sky Greens pioneered vertical farming with its rotating hydroponic towers. It grows vegetables for local markets, offering water-efficient solutions to address Singapore's land and water constraints.

GreenLand: Operating in China, GreenLand designs large-scale vertical farming systems using hydroponics. The company targets urban vegetable production, supporting China's food security goals with efficient, scalable technology.

Scatil: Based in Japan, Scatil focuses on compact hydroponic systems for urban farming. It serves local markets with affordable, high-yield solutions, emphasizing

sustainability and space optimization.

Jingpeng: Headquartered in China, Jingpeng provides hydroponic and CEA modules for vertical farming. The company caters to large-scale vegetable production, supporting China's urban agriculture with robust, technology-driven systems.

Metropolis Farms: Located in Philadelphia, USA, Metropolis Farms operates indoor hydroponic farms for vegetables. It serves urban markets with fresh produce, focusing on community integration and sustainable farming practices.

Plantagon: Based in Sweden, Plantagon develops vertical farming systems with a focus on urban integration. It uses hydroponics to grow vegetables, targeting European cities with innovative, eco-friendly designs.

Spread: Operating from Japan, Spread builds large-scale hydroponic farms for leafy greens. The company emphasizes automation and efficiency, serving Japan's urban markets with consistent, high-quality produce.

Sanan Sino Science: Headquartered in China, Sanan Sino Science offers hydroponic and CEA systems for vertical farming. It targets urban vegetable production with scalable, cost-efficient solutions to meet China's growing demand.

Nongzhong Wulian: Based in China, Nongzhong Wulian develops IoT-enabled vertical farming modules. It serves urban markets with smart hydroponic systems, focusing on technology integration and resource efficiency.

Vertical Harvest: Located in Wyoming, USA, Vertical Harvest operates hydroponic vertical farms for community-focused production. It grows vegetables for local markets, emphasizing sustainability and social impact.

Infinite Harvest: Based in Colorado, USA, Infinite Harvest designs modular hydroponic systems for indoor farming. It serves urban and rural markets with customizable, high-yield solutions for vegetable cultivation.

Metro Farms: Operating in Singapore, Metro Farms develops hydroponic vertical farms for vegetables. It targets urban consumers with compact, sustainable systems, addressing local food security needs.

These companies compete on technology, water efficiency, and scalability, driving the market with innovative, region-specific solutions.

Porter's Five Forces Analysis

The threat of new entrants is moderate, requiring significant investment in technology and expertise, though niche players can emerge. Substitutes are medium, with traditional farming as an option, but land and water scarcity limit its competitiveness.

Buyer power is medium, with retailers negotiating prices, but demand for fresh produce sustains loyalty. Supplier power is moderate, with components like LEDs widely available, though specialized tech can constrain options. Rivalry is high, with differentiation through automation, sustainability, and crop quality driving innovation.

Market Opportunities and Challenges

Opportunities

Rising food demand driving vertical farming adoption.

Water-efficient technologies enhancing market appeal.

Government support for sustainable agriculture boosting investment.

Challenges

High initial costs limiting small-scale adoption.

Energy-intensive operations increasing expenses.

Limited crop variety suitable for vertical systems constraining growth.

Merger and Acquisition News

Vertical Farming Company Expands by Acquiring Three Farms (Date: April 2024): A leading vertical farming company acquired three facilities, expanding its hydroponics capacity to meet North American urban demand.

Vertical Farming Startup Plenty to Expand via \$680 mln JV with UAE's Mawarid (Date: August 2024): Plenty partnered with Mawarid in a \$680 million joint venture, scaling its aeroponics operations to enhance UAE food security.

GreenState Acquires Yasai to Become Vertical Farming Market Leader in Switzerland (Date: November 2024): GreenState acquired Yasai, consolidating its hydroponics leadership in Switzerland's premium produce market.

Growth Trend Analysis

The World Economic Forum notes that only 3% of global water is suitable for drinking and farming, with usage growing twice as fast as population increases, potentially rising 50% by 2030. Agriculture's 70% share of water withdrawals exacerbates scarcity and soil salinization, driving demand for vertical farming systems like hydroponics and aeroponics, which use up to 90% less water. The United Nations highlights China's water scarcity—21% of the world's population with 6% of its freshwater—fueling adoption of these systems. North America's urban focus, Europe's sustainability push, and Asia Pacific's resource constraints support the market's 8-9% CAGR, driven by food security needs and technological advancements.

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