

# **Farm-to-Table Market Forecasts to 2034 – Global Analysis By Offering (Food Products, and Services), Source (Local Farms, Organic Farms, Urban Farms, Hydroponic & Vertical Farms, and Other Sources), Business Model, Restaurant Type, Cuisine Type, Service Type, End User, and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Farm-to-Table Market is accounted for \$14.5 billion in 2026 and is expected to reach \$31.4 billion by 2034 growing at a CAGR of 10.1% during the forecast period. The farm-to-table movement emphasizes direct sourcing of food from producers to consumers, bypassing lengthy supply chains to deliver fresher, more nutritious, and traceable products. This market encompasses fresh produce, dairy, meat, and artisanal goods distributed through various channels including direct sales, restaurant partnerships, and online platforms. Growing consumer demand for transparency, local economic support, and reduced carbon footprints is reshaping agricultural distribution models, creating opportunities for small and medium-scale farms to connect directly with end users across developed and emerging economies.

### **Market Dynamics:**

#### **Driver:**

Rising consumer demand for food transparency and traceability

Modern shoppers increasingly want to know exactly where their food originates, how it was grown, and what practices were used during production. This desire for visibility into the supply chain has propelled farm-to-table models into mainstream retail and food

service channels, as these systems inherently offer shorter, more transparent routes from field to fork. Consumers associate locally sourced products with superior freshness, better nutritional profiles, and reduced environmental impact from transportation. The proliferation of smartphone apps and QR code labeling further enables this transparency, allowing customers to access farm histories and production methods instantly at the point of purchase, reinforcing trust and driving repeat business.

**Restraint:**

Seasonal limitations and supply inconsistency

Farm-to-table models face inherent challenges related to regional growing seasons and weather-dependent harvests, creating gaps in product availability that frustrate consumers accustomed to year-round grocery store abundance. Restaurants committed to local sourcing must frequently redesign menus as seasonal ingredients come and go, increasing operational complexity and costs. Extreme weather events linked to climate change further disrupt predictable harvest schedules, making it difficult for farms to guarantee consistent supply volumes to retail and restaurant partners. These limitations push some businesses to supplement with conventionally sourced items, diluting the farm-to-table promise and potentially disappointing value-driven customers.

**Opportunity:**

Expansion of urban farming and controlled environment agriculture

Innovative growing methods including hydroponics, vertical farms, and rooftop greenhouses are enabling food production within city limits, dramatically shortening supply chains and reducing transportation emissions. These controlled environments allow year-round cultivation regardless of external weather conditions, addressing the seasonality challenge that has historically constrained farm-to-table models. Urban farms can deliver produce within hours of harvest to nearby restaurants, grocery stores, and consumers, maximizing freshness and nutritional value. As technology costs decrease and cities incentivize local food production through zoning and tax benefits, urban farming is poised to become a significant growth engine for the broader farm-to-table ecosystem.

**Threat:**

Price competition from industrialized agriculture and global supply chains

Large-scale conventional farming operations benefit from economies of scale, mechanization, and global sourcing networks that drive down per-unit costs below what most local farms can achieve. This price differential pressures farm-to-table businesses to justify premium pricing through quality and values-based differentiation, a message that may not resonate with all consumer segments. During economic downturns, even committed conscious consumers may revert to lower-cost conventional options, threatening the financial viability of smaller producers. Additionally, global retailers can absorb losses temporarily to undercut local competitors, creating challenging market conditions for farm-to-table participants with thinner margins.

### **Covid-19 Impact:**

The pandemic delivered a paradoxical impact on the farm-to-table market, simultaneously devastating restaurant channels while dramatically boosting direct-to-consumer sales. When food service establishments closed, many farms pivoted rapidly to community-supported agriculture (CSA) boxes and online marketplaces, forging direct relationships with homebound consumers seeking reliable, fresh food sources. Supply chain disruptions exposed vulnerabilities in long-distance food distribution, increasing appreciation for local food systems' resilience. This period permanently elevated consumer awareness of where food comes from, with many pandemic-era direct purchasing habits continuing post-crisis. The experience fundamentally strengthened the farm-to-table value proposition across multiple consumer segments.

The Local Farms segment is expected to be the largest during the forecast period

The Local Farms segment is expected to account for the largest market share during the forecast period, representing traditional agricultural producers serving their immediate geographic regions without long-distance transportation. These farms benefit from established community relationships, lower logistical costs, and the ability to market directly to nearby consumers who value freshness and supporting local economies. Many local farms are family-owned operations that have served their communities for generations, creating trust and loyalty that newer market entrants struggle to match. The segment's dominance is reinforced by consumer preferences for products traveling minimal distances, perceived superior taste and nutritional qualities, and the emotional satisfaction of supporting neighborhood agricultural heritage.

The Online Platforms & Marketplaces segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Online Platforms & Marketplaces segment is predicted to witness the highest growth rate, connecting consumers directly with multiple local farms through user-friendly digital interfaces. These platforms solve the discovery and convenience challenges that have historically limited farm-to-table adoption by aggregating products from various producers into single checkout experiences with home delivery or pickup options. Integration with mobile payment systems, subscription management tools, and transparent farmer profiles enhances customer trust and engagement. As rural broadband access improves and last-mile logistics for fresh produce become more sophisticated, these digital intermediaries are rapidly expanding their geographic coverage and product ranges, capturing consumers who value farm-fresh food but lack time for farmer's market visits.

### **Region with largest share:**

During the forecast period, the North America region is expected to hold the largest market share, driven by mature farm-to-table infrastructure, high consumer awareness, and strong support from both independent restaurants and retail chains. The region's extensive network of farmers markets, community-supported agriculture programs, and direct-to-consumer farm stands provides multiple access points for conscious consumers. Major metropolitan areas including San Francisco, New York, and Portland have established deeply embedded local food cultures that serve as models for other regions. Additionally, favorable agricultural policies and grant programs supporting small and mid-sized farms help sustain the supply side of the market, reinforcing North America's leadership position throughout the forecast period.

### **Region with highest CAGR:**

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by rapid urbanization, rising middle-class disposable incomes, and increasing food safety concerns following repeated contamination scandals. Countries including China, India, and Vietnam are witnessing growing consumer interest in premium, traceable food products as traditional wet markets face modernization pressure. Government initiatives promoting agricultural technology and direct farmer-consumer connections, particularly through digital platforms, are accelerating market development. The region's large population base means even modest percentage adoption rates translate into substantial absolute market growth.

### **Key players in the market**

Some of the key players in Farm-to-Table Market include Sysco Corporation, US Foods Holding Corp., Performance Food Group Company, The Chefs' Warehouse Inc., Fresh Del Monte Produce Inc., Dole plc, Aramark, Compass Group plc, Sodexo S.A., HelloFresh SE, Blue Apron Holdings Inc., Misfits Market Inc., Thrive Market Inc., LocalHarvest Inc., Farmbox Direct Inc., and Good Eggs Inc.

### **Key Developments:**

In January 2026, Sodexo S.A. announced that the acquisition of Grupo Mediterra is entering the final regulatory approval phase, intended to strengthen its position in the Spanish healthcare and education markets.

In December 2025, Compass Group plc completed the \$1.7 billion acquisition of Vermaat, a premium food services business in the Netherlands, to expand its high-quality retail and food service footprint in Europe.

### **Offerings Covered:**

Food Products

Services

### **Sources Covered:**

Local Farms

Organic Farms

Urban Farms

Hydroponic & Vertical Farms

Other Sources

### **Business Models Covered:**

Direct-to-Consumer (D2C)

Farm-to-Restaurant (B2B)

Farmers Markets

Online Platforms & Marketplaces

Retail Partnerships

#### Restaurant Types Covered:

Fine Dining

Casual Dining

Quick Service Restaurants (QSRs)

Cafés & Bistros

Other Restaurant Types

#### Cuisine Types Covered:

Regional Cuisine

International Cuisine

Fusion Cuisine

#### Service Types Covered:

Dine-In

Takeaway

Delivery

End Users Covered:

Individual Consumers

Households

Corporate Clients

Hospitality Sector (Hotels & Catering)

Institutional Buyers

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

#### Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

#### South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

**What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032

and 2034

- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

### **Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

### **2 RESEARCH FRAMEWORK**

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
  - 2.4.1 Data Collection (Primary and Secondary)
  - 2.4.2 Data Modeling and Estimation Techniques
  - 2.4.3 Data Validation and Triangulation
  - 2.4.4 Analytical and Forecasting Approach

### **3 MARKET DYNAMICS AND TREND ANALYSIS**

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

### **4 COMPETITIVE AND STRATEGIC ASSESSMENT**

- 4.1 Porter's Five Forces Analysis
  - 4.1.1 Supplier Bargaining Power
  - 4.1.2 Buyer Bargaining Power
  - 4.1.3 Threat of Substitutes
  - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

## **5 GLOBAL FARM-TO-TABLE MARKET, BY OFFERING**

- 5.1 Food Products
  - 5.1.1 Fresh Produce
  - 5.1.2 Dairy Products
  - 5.1.3 Meat & Poultry
  - 5.1.4 Seafood
  - 5.1.5 Processed Farm-to-Table Products
- 5.2 Services
  - 5.2.1 Farm-to-Table Restaurants
  - 5.2.2 Subscription Boxes / CSA (Community Supported Agriculture)
  - 5.2.3 Farm Experiences & Agritourism

## **6 GLOBAL FARM-TO-TABLE MARKET, BY SOURCE**

- 6.1 Local Farms
- 6.2 Organic Farms
- 6.3 Urban Farms
- 6.4 Hydroponic & Vertical Farms
- 6.5 Other Sources

## **7 GLOBAL FARM-TO-TABLE MARKET, BY BUSINESS MODEL**

- 7.1 Direct-to-Consumer (D2C)
- 7.2 Farm-to-Restaurant (B2B)
- 7.3 Farmers Markets
- 7.4 Online Platforms & Marketplaces
- 7.5 Retail Partnerships

## **8 GLOBAL FARM-TO-TABLE MARKET, BY RESTAURANT TYPE**

- 8.1 Fine Dining
- 8.2 Casual Dining
- 8.3 Quick Service Restaurants (QSRs)
- 8.4 Caf?s & Bistros

## 8.5 Other Restaurant Types

# 9 GLOBAL FARM-TO-TABLE MARKET, BY CUISINE TYPE

## 9.1 Regional Cuisine

## 9.2 International Cuisine

## 9.3 Fusion Cuisine

# 10 GLOBAL FARM-TO-TABLE MARKET, BY SERVICE TYPE

## 10.1 Dine-In

## 10.2 Takeaway

## 10.3 Delivery

# 11 GLOBAL FARM-TO-TABLE MARKET, BY END USER

## 11.1 Individual Consumers

## 11.2 Households

## 11.3 Corporate Clients

## 11.4 Hospitality Sector (Hotels & Catering)

## 11.5 Institutional Buyers

# 12 GLOBAL FARM-TO-TABLE MARKET, BY GEOGRAPHY

## 12.1 North America

### 12.1.1 United States

### 12.1.2 Canada

### 12.1.3 Mexico

## 12.2 Europe

### 12.2.1 United Kingdom

### 12.2.2 Germany

### 12.2.3 France

### 12.2.4 Italy

### 12.2.5 Spain

### 12.2.6 Netherlands

### 12.2.7 Belgium

### 12.2.8 Sweden

### 12.2.9 Switzerland

### 12.2.10 Poland

- 12.2.11 Rest of Europe
- 12.3 Asia Pacific
  - 12.3.1 China
  - 12.3.2 Japan
  - 12.3.3 India
  - 12.3.4 South Korea
  - 12.3.5 Australia
  - 12.3.6 Indonesia
  - 12.3.7 Thailand
  - 12.3.8 Malaysia
  - 12.3.9 Singapore
  - 12.3.10 Vietnam
  - 12.3.11 Rest of Asia Pacific
- 12.4 South America
  - 12.4.1 Brazil
  - 12.4.2 Argentina
  - 12.4.3 Colombia
  - 12.4.4 Chile
  - 12.4.5 Peru
  - 12.4.6 Rest of South America
- 12.5 Rest of the World (RoW)
  - 12.5.1 Middle East
    - 12.5.1.1 Saudi Arabia
    - 12.5.1.2 United Arab Emirates
    - 12.5.1.3 Qatar
    - 12.5.1.4 Israel
    - 12.5.1.5 Rest of Middle East
  - 12.5.2 Africa
    - 12.5.2.1 South Africa
    - 12.5.2.2 Egypt
    - 12.5.2.3 Morocco
    - 12.5.2.4 Rest of Africa

## **13 STRATEGIC MARKET INTELLIGENCE**

- 13.1 Industry Value Network and Supply Chain Assessment
- 13.2 White-Space and Opportunity Mapping
- 13.3 Product Evolution and Market Life Cycle Analysis
- 13.4 Channel, Distributor, and Go-to-Market Assessment

## **14 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES**

- 14.1 Mergers and Acquisitions
- 14.2 Partnerships, Alliances, and Joint Ventures
- 14.3 New Product Launches and Certifications
- 14.4 Capacity Expansion and Investments
- 14.5 Other Strategic Initiatives

## **15 COMPANY PROFILES**

- 15.1 Sysco Corporation
- 15.2 US Foods Holding Corp.
- 15.3 Performance Food Group Company
- 15.4 The Chefs' Warehouse Inc.
- 15.5 Fresh Del Monte Produce Inc.
- 15.6 Dole plc
- 15.7 Aramark
- 15.8 Compass Group plc
- 15.9 Sodexo S.A.
- 15.10 HelloFresh SE
- 15.11 Blue Apron Holdings Inc.
- 15.12 Misfits Market Inc.
- 15.13 Thrive Market Inc.
- 15.14 LocalHarvest Inc.
- 15.15 Farmbox Direct Inc.
- 15.16 Good Eggs Inc.

## List Of Tables

### LIST OF TABLES

- Table 1 Global Farm-to-Table Market Outlook, By Region (2023–2034) (\$MN)
- Table 2 Global Farm-to-Table Market Outlook, By Offering (2023–2034) (\$MN)
- Table 3 Global Farm-to-Table Market Outlook, By Food Products (2023–2034) (\$MN)
- Table 4 Global Farm-to-Table Market Outlook, By Fresh Produce (2023–2034) (\$MN)
- Table 5 Global Farm-to-Table Market Outlook, By Dairy Products (2023–2034) (\$MN)
- Table 6 Global Farm-to-Table Market Outlook, By Meat & Poultry (2023–2034) (\$MN)
- Table 7 Global Farm-to-Table Market Outlook, By Seafood (2023–2034) (\$MN)
- Table 8 Global Farm-to-Table Market Outlook, By Processed Farm-to-Table Products (2023–2034) (\$MN)
- Table 9 Global Farm-to-Table Market Outlook, By Services (2023–2034) (\$MN)
- Table 10 Global Farm-to-Table Market Outlook, By Farm-to-Table Restaurants (2023–2034) (\$MN)
- Table 11 Global Farm-to-Table Market Outlook, By Subscription Boxes / CSA (Community Supported Agriculture) (2023–2034) (\$MN)
- Table 12 Global Farm-to-Table Market Outlook, By Farm Experiences & Agritourism (2023–2034) (\$MN)
- Table 13 Global Farm-to-Table Market Outlook, By Source (2023–2034) (\$MN)
- Table 14 Global Farm-to-Table Market Outlook, By Local Farms (2023–2034) (\$MN)
- Table 15 Global Farm-to-Table Market Outlook, By Organic Farms (2023–2034) (\$MN)
- Table 16 Global Farm-to-Table Market Outlook, By Urban Farms (2023–2034) (\$MN)
- Table 17 Global Farm-to-Table Market Outlook, By Hydroponic & Vertical Farms (2023–2034) (\$MN)
- Table 18 Global Farm-to-Table Market Outlook, By Other Sources (2023–2034) (\$MN)
- Table 19 Global Farm-to-Table Market Outlook, By Business Model (2023–2034) (\$MN)
- Table 20 Global Farm-to-Table Market Outlook, By Direct-to-Consumer (D2C) (2023–2034) (\$MN)
- Table 21 Global Farm-to-Table Market Outlook, By Farm-to-Restaurant (B2B) (2023–2034) (\$MN)
- Table 22 Global Farm-to-Table Market Outlook, By Farmers Markets (2023–2034) (\$MN)
- Table 23 Global Farm-to-Table Market Outlook, By Online Platforms & Marketplaces (2023–2034) (\$MN)
- Table 24 Global Farm-to-Table Market Outlook, By Retail Partnerships (2023–2034) (\$MN)
- Table 25 Global Farm-to-Table Market Outlook, By Restaurant Type (2023–2034)

(\$MN)

Table 26 Global Farm-to-Table Market Outlook, By Fine Dining (2023–2034) (\$MN)

Table 27 Global Farm-to-Table Market Outlook, By Casual Dining (2023–2034) (\$MN)

Table 28 Global Farm-to-Table Market Outlook, By Quick Service Restaurants (QSRs) (2023–2034) (\$MN)

Table 29 Global Farm-to-Table Market Outlook, By Cafés & Bistros (2023–2034) (\$MN)

Table 30 Global Farm-to-Table Market Outlook, By Other Restaurant Types (2023–2034) (\$MN)

Table 31 Global Farm-to-Table Market Outlook, By Cuisine Type (2023–2034) (\$MN)

Table 32 Global Farm-to-Table Market Outlook, By Regional Cuisine (2023–2034) (\$MN)

Table 33 Global Farm-to-Table Market Outlook, By International Cuisine (2023–2034) (\$MN)

Table 34 Global Farm-to-Table Market Outlook, By Fusion Cuisine (2023–2034) (\$MN)

Table 35 Global Farm-to-Table Market Outlook, By Service Type (2023–2034) (\$MN)

Table 36 Global Farm-to-Table Market Outlook, By Dine-In (2023–2034) (\$MN)

Table 37 Global Farm-to-Table Market Outlook, By Takeaway (2023–2034) (\$MN)

Table 38 Global Farm-to-Table Market Outlook, By Delivery (2023–2034) (\$MN)

Table 39 Global Farm-to-Table Market Outlook, By End User (2023–2034) (\$MN)

Table 40 Global Farm-to-Table Market Outlook, By Individual Consumers (2023–2034) (\$MN)

Table 41 Global Farm-to-Table Market Outlook, By Households (2023–2034) (\$MN)

Table 42 Global Farm-to-Table Market Outlook, By Corporate Clients (2023–2034) (\$MN)

Table 43 Global Farm-to-Table Market Outlook, By Hospitality Sector (Hotels & Catering) (2023–2034) (\$MN)

Table 44 Global Farm-to-Table Market Outlook, By Institutional Buyers (2023–2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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