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Reverse Logistics in Agri Value Chains Market Forecasts to 2032 – Global Analysis By Commodity Type (Fruits & Vegetables, Dairy & Milk Products, Meat, Poultry & Seafood and Other Commodity Types), Reverse Flow Type, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Reverse Logistics in Agri Value Chains Market is accounted for $7.4 billion in 2025 and is expected to reach $13.2 billion by 2032 growing at a CAGR of 8.5% during the forecast period. Reverse logistics in agri value chains refers to the coordinated process of collecting, transporting, and managing agricultural products, inputs, and packaging materials that move backward from consumers or downstream actors to producers, processors, or recyclers. It involves the return of unsold, expired, damaged, or surplus farm goods; recovery of reusable assets like crates, pallets, and containers; and the recycling or safe disposal of agricultural waste. In modern agri systems, reverse logistics enhances resource efficiency, reduces environmental impact, supports circular economy practices, and helps farmers and agri-businesses reclaim value from recovered materials while ensuring compliance with sustainability and waste-management regulations.

Market Dynamics:

Driver:

Growing focus on sustainable agri waste recovery

Governments and industry bodies are promoting circular economy practices to reduce

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food loss and agricultural waste. Retailers and processors are increasingly investing in reverse logistics systems to recover unsold produce and by-products. Rising demand for eco-friendly practices reinforces adoption of waste recovery solutions across agri supply chains. Technological innovations in sorting, recycling, and composting enhance efficiency of reverse flows. Consumer preference for sustainable brands further accelerates investment in recovery systems.

Restraint:

Poor rural infrastructure hampers reverse flows

Many farming regions lack adequate cold chain, storage, and transport facilities to support reverse logistics. Limited road connectivity and fragmented supply chains reduce efficiency of backward flows. Smaller cooperatives struggle to implement reverse systems without institutional support. High costs of infrastructure development further exacerbate challenges in rural areas. The digital divide slows adoption of traceability and monitoring tools in underserved regions. Consequently, poor rural infrastructure is constraining market expansion.

Opportunity:

Traceability adoption improving backward supply flows

Digital platforms and blockchain solutions are increasingly used to track produce returns and waste recovery. Enhanced visibility strengthens accountability across farmers, processors, and retailers. Traceability systems reduce fraud, improve compliance, and optimize reverse logistics efficiency. Rising demand for food safety and transparency aligns directly with traceability adoption. Governments and NGOs are promoting digital agriculture initiatives to strengthen backward flows. As a result, traceability adoption is fostering market opportunities.

Threat:

Lack of awareness among small farmers

Many farmers are unfamiliar with the benefits of recovery systems and traceability platforms. Limited training and outreach reduce participation in reverse flows. Without awareness, smallholders risk being excluded from sustainable supply chain initiatives. This gap widens inequality between large-scale producers and small farmers. NGOs

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and cooperatives face challenges in scaling education programs across fragmented rural communities. Consequently, lack of awareness is hindering market growth.

Covid-19 Impact:

The COVID-19 pandemic had a mixed impact on the Reverse Logistics in Agri Value Chains market. Lockdowns disrupted supply chains, reducing efficiency of reverse flows and increasing food waste. Economic uncertainty slowed investment in recovery infrastructure in several regions. However, heightened awareness of food security and sustainability reinforced demand for reverse logistics solutions. Governments emphasized waste reduction and digital agriculture in recovery programs, supporting adoption. Online grocery and e-commerce platforms accelerated demand for traceability and recovery systems.

The fruits & vegetables segment is expected to be the largest during the forecast period

The fruits & vegetables segment is expected to account for the largest market share during the forecast period driven by high perishability and strong demand for recovery systems. Reverse logistics platforms are increasingly used to manage unsold produce, reduce waste, and improve sustainability. Strong demand from retailers and e-commerce grocery platforms reinforces adoption. Regulatory mandates on food loss reduction align directly with the benefits of reverse flows in this segment. Cold chain investments strengthen efficiency of fruit and vegetable recovery systems. Consumer preference for fresh and sustainable produce amplifies demand for reverse logistics solutions.

The packaging recovery & recycling segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the packaging recovery & recycling segment is predicted to witness the highest growth rate, reflecting strong demand for sustainable packaging solutions in agri supply chains. Retailers and logistics providers are increasingly adopting recovery systems for cartons, crates, and biobased packaging. Rising popularity of eco-friendly packaging accelerates adoption in this segment. Advances in recycling technologies strengthen competitiveness of packaging recovery platforms. The segment benefits from strong growth in e-commerce grocery and food delivery services. Government initiatives promoting circular economy practices further reinforce adoption.

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Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share by strong regulatory mandates and advanced logistics infrastructure. The United States and Canada benefit from widespread adoption of reverse logistics systems across agri-food industries. Government initiatives promoting food waste reduction and sustainability reinforce adoption. The presence of leading agri-tech firms and logistics providers strengthens regional leadership. Strong demand from retailers and subscription-based grocery services accelerates growth. Established cold chain and recycling networks further expand platform usage.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR due to rapid urbanization and booming e-commerce grocery demand. Countries such as China, India, and Japan are witnessing strong investment in reverse logistics and recovery systems. Expanding middle-class populations and growing disposable incomes support premium product adoption. Government initiatives promoting food security and sustainable agriculture further accelerate adoption. Local startups and multinational firms are investing in scalable recovery and recycling solutions. Growth in mobile-first e-commerce ecosystems adds momentum to regional expansion.

Key players in the market

Some of the key players in Reverse Logistics in Agri Value Chains Market include DHL Supply Chain, FedEx Logistics, UPS Supply Chain Solutions, XPO Logistics, Kuehne + Nagel International AG, DB Schenker, Maersk Logistics, Ninjacart, CropIn Technology Solutions Pvt. Ltd., AgriDigital, WayCool Foods, DeHaat, Amcor, Mondi Group and Smurfit Kappa Group.

Key Developments:

In February 2024, UPS announced a major expansion of its UPS Healthcare wing, adding over 1.5 million square feet of cGMP$$- and GDP-compliant warehouse space globally. While focused on pharmaceuticals, these facilities are equipped for stringent temperature control and traceability, which are directly transferable to high-value, temperature-sensitive agricultural products like seeds, biologics, and premium foods, enabling compliant and secure reverse logistics for recalled or expired items within the agri-value chain.

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In August 2023, DHL Supply Chain acquired the Australian Glen Cameron Group. This expansion significantly strengthened its road freight capabilities, which is critical for efficient reverse logistics operations. A denser and more flexible transport network allows for better management of returned goods.

Commodity Types Covered:

- Fruits & Vegetables
- Dairy & Milk Products
- Meat, Poultry & Seafood
- Grains & Cereals
- Coffee, Cocoa & Specialty Crops
- Other Commodity Types

Reverse Flow Types Covered:

- Product Returns
- Packaging Recovery & Recycling
- By-Product Reuse
- Cold Chain Returns
- Composting & Organic Waste Management
- Waste-to-Energy Recovery
- Other Reverse Flow Types

End Users Covered:

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- Farmers & Producer Cooperatives
- Food & Beverage Manufacturers
- Retail Chains & E-Commerce Platforms
- Logistics & Fulfillment Providers
- Government & NGOs
- Waste Management & Recycling Companies
- Food Service & Quick-Commerce Providers
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain

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- Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India
  - Australia
  - New Zealand
  - South Korea
  - Rest of Asia Pacific
- South America
  - Argentina
  - Brazil
  - Chile
  - Rest of South America
- Middle East & Africa
  - Saudi Arabia
  - UAE
  - Qatar
  - South Africa
  - Rest of Middle East & Africa

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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 2024, 2025, 2026, 2028, and 2032
- 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

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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