SCOTTS INTERNATIONAL

US Healthcare/Hospital Food Services Market by Type (Patient Dining (Clinical Nutrition, Regular Diet), Retail Services, Vending), Settings (Acute Hospitals, ASC, Long-term care Facilities, Skilled Nursing Facilities, Physician Office) - Forecast to 2029

Market Report | 2025-03-18 | 146 pages | MarketsandMarkets

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Report description:

The US healthcare/hospital food services market is projected to reach USD 33.57 billion by 2029 from USD 19.84 billion in 2024, at a CAGR of 11.1% during the forecast period. US healthcare/hospital food services, has been driven by various reasons including the greater emphasis on patient care, higher attention to recovery nutrition, and adherence to dietary regulations. Well-quality, personalized meal plans are being offered by hospitals in large numbers to boost patient satisfaction and outcomes. Moreover, the increase in chronic diseases like diabetes and cardiovascular diseases has raised the demand for specialized dietary programs. Food service technology advancements, sustainability movements, and demand for locally grown and organic foods are all helping drive market growth as well.
"By type, patient & dining services segment is expected to have the largest market share in the US healthcare/hospital food services market."
Based on type, the market share of patient & dining services in the US healthcare/hospital food services sector is highest, because it is an indispensable contributor to hospital stay, patient care, and recovery. Healthcare facilities and hospitals find this segment indispensable because it has a direct bearing on the health outcomes of patients, particularly chronically ill patients such as those suffering from diabetes, cardiovascular diseases, and gastrointestinal disorders which need special diet regimens. Besides, compliance with regulatory standards laid down by organizations like the Centers for Medicare & Medicaid Services (CMS) and the Joint Commission necessitates that hospitals provide nutritionally sound and quality meals, driving demand for this category. In addition, patient satisfaction metrics are a rising concern area for hospitals as they affect hospital reputation and reimbursement levels, prompting investments in meal quality, customization, and service optimization. The inclusion of technology advancements

like digital ordering of meals, nutrition monitoring through AI, and automated food preparation has also helped in the expansion of the segment. Further, the increasing trend towards individualized and therapeutic nutrition programs according to the needs of individual patients increases the significance of this segment. In comparison with other segments like retail food services and vending, patient & dining services remain a core part of hospital operations, emphasizing proper nutrition, compliance with regulations, and enhanced patient satisfaction, hence remaining the leading segment in the market.

"By setting, acute care settings segment is expected to have the largest market share in the US healthcare/hospital food services market."

Based on setting, acute care settings is the biggest market share in the US healthcare/hospital food services segment, as the patient load being extremely high, patients stays in such facilities extended, and critical nature of managing patients diet. Acute hospitals, including specialty medical, general hospitals, trauma centers, have patients of high medical urgency for treatment and/or surgical recoveries and acute conditions, and so all necessitate regular nutrition-fitted meals services. The strict guidelines by organizations such as the Centers for Medicare & Medicaid Services (CMS) and the Joint Commission require hospitals to offer food that conforms to specified dietary requirements to aid proper nutrition towards recovery and compliance with treatment. Moreover, growing incidence of chronic diseases like diabetes, cardiovascular conditions, and obesity disorders has created a higher need for personalized diet plans including low-sodium, low-sugar, and high-protein food. Several hospitals have also implemented room service-style meal service models along with high-end food service management technologies to improve meal personalization and enhance patient satisfaction. In addition, the large investments by major healthcare facilities in cutting-edge food service solutions, sustainability programs, and local food supplier partnerships further reinforce the market dominance of the acute care environment.

A breakdown of the primary participants (supply-side) for the US healthcare/hospital food services market referred to for this report is provided below:

- By Company Type: Tier 1-35%, Tier 2-40%, and Tier 3-25%
- By Designation: C-level-20%, Director Level-35%, and Others-45%

Prominent players in the US healthcare/hospital food services market are Compass Group PLC (UK), Sodexo (France), Aramark (US), Elior Group (France), ISS World (US), Healthcare Services Group (US), Performance Food Group (US), AVI Foodsystems, Inc (US), Whitsons Culinary Group (US), Metz Culinary Management (US), The Nutrition Group (US), HHS (US), Culinary Services Group (US), Prince Food Systems (US) and Food Management Group, Inc. (US).

Research Coverage:

The report analyzes the US healthcare/hospital food services market and aims at estimating the market size and future growth potential of this market based on various segments such as devices & consumables, cancer type, procedure, end user and region. The report also includes a competitive analysis of the key players in this market along with their company profiles, service offerings, recent developments, and key market strategies.

Reasons to Buy the Report

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall US healthcare/hospital food services market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

This report provides insights into the following pointers:

- Analysis of key drivers (Increasing prevalence of and awareness about chronic diseases, growing focus on improved patient food experience, customized food options based on diet requirements, hospital regulations restricting outside food items, Hospitals leveraging outsourced food services to reduce operational costs), restraints (Reluctance among OPD patients to pay for food services, staff shortages), opportunities (Rising adoption of diverse food menus, Low adoption of foodservice outsourcing by

healthcare settings), challenges (Complexity of patient nutritional issues, managing operational efficiency)
- Market Penetration: It includes extensive information on services offered by the major players in the US healthcare/hospital food services market. The report includes various segments in type and setting.
- Service Enhancement/Innovation: Comprehensive details about new service launches and anticipated trends in the US healthcare/hospital food services market.
- Market Development: Thorough knowledge and analysis of the profitable rising markets by type and setting.
- Market Diversification: Comprehensive information about newly launched services, expanding markets, current advancements, and investments in the US healthcare/hospital food services market.
- Competitive Assessment: Thorough evaluation of the market shares, growth plans, offerings of services, and capacities of the major competitors in the US healthcare/hospital food services market.

Table of Contents:

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