Allegro 234

Transformation Consultants and Doers

Yet Another One Talking About 2026 Trends | On Agriculture Sector

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The world of agriculture is shifting faster than ever, shaped by new technologies, changing consumer expectations and the growing urgency of climate resilience. This trends analysis brings together insights from leading global sources to highlight how people, sectors and brands are evolving as we move towards 2026.

From regenerative farming and AI-powered decision-making to the rise of food citizenship and the need for radical transparency, the trends outlined here reveal a sector in the middle of deep transformation and full of opportunity for those ready to adapt, collaborate and innovate.

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Agenda

Executive Summary

People Trends

- Consumers are climate-conscious but financially limited; they want sustainable solutions that feel affordable and worthwhile.
- Food citizenship is growing, with people seeking local identity, transparency, and connection to farmers.
- Digital platforms shape food discovery, trust and switching behaviour.

Sector Trends

- Regenerative agriculture is scaling rapidly across ecosystems and becoming central to policy and corporate strategy.
- AgTech, AI and robotics are transforming productivity, resilience, and risk management.
- Urban and distributed food systems are creating new supply-chain and branding opportunities.

Brand Trends

- Radical transparency replaces vague eco-claims as consumers demand proof.
- Brands become ecosystem orchestrators connecting data, finance, technology, and farmer support.
- Trust is built through consistent quality, performance, and long-term commitment.

People in the Sector

- Farmers and agri-professionals are evolving into hybrid tech–sustainability experts.
- Risk management is now a central professional skillset.
- New leadership roles emerge that integrate agronomy, sustainability, data, and strategy.

People with Brands

- Sustainability is expected, but affordability and quality drive loyalty.
- Digital conversations and social listening influence reputation and decision-making.
- People crave visibility into food origins and connection to farmers.

Sector + Brand Trends

- Value creation shifts from volume to resilience, impact, and data advantage.
- Ecosystems replace linear chains; collaboration becomes essential.
- Data becomes agriculture's new currency.

Trends in People

Macro Shifts in Consumer and Professional Behaviour Affecting Agriculture

The world of agriculture no longer lives behind the scenes. Today's consumers and professionals, whether buying fresh produce, evaluating agricultural inputs, or shaping food policies, are increasingly connected to farming values, environmental concerns, digital platforms, and broader cultural expectations around sustainability, affordability, trust, and transparency.

This chapter explores how people are thinking, feeling, and behaving across markets, and how these attitudes shape agricultural systems.

> The tone of this transformation is deeply human: people want to eat well, feel secure about the future of food, and make choices that reflect their values, without feeling financially burdened.

Trend 1 | Climate-Conscious but Cost-Pressed Food Citizens

People are more aware of the environmental consequences of what they buy, cook, and throw away. Yet, cost-of-living pressures significantly influence their ultimate decisions. Across the world, sustainability intention is rising, but sustainable action is increasingly restricted by price sensitivity.

Mintel's sustainability outlook reveals that consumers want *resource-conscious* options that do not feel elitist or financially inaccessible.

They favour products that "do good" for the planet but that also deliver convenience and value. Meanwhile, Brandwatch reports that food is one of the most emotionally charged topics in online discussions, largely due to high inflation, rising household budgets and growing distrust in large corporations.

For the agriculture sector, this creates a nuanced shift:

- People want food that is sustainably grown
- People expect better proof of impact
- They refuse to accept higher prices unless value is visible and tangible.

A new food psychology emerges, consumers don't want to sacrifice sustainability, but they are unwilling to compromise their financial security.

> Brands that can close this gap -affordable sustainability- earn trust, loyalty, and relevance.

Patagonia Provisions

Patagonia Provisions shows how food brands can turn regenerative agriculture into a compelling value narrative. The brand makes sustainability *feel tangible* by explaining farming practices, ecosystem impacts, and farmer relationships in a friendly, visually accessible way. It empowers cost-conscious but eco-aware urban consumers to feel that their purchase "heals nature"—not just avoids harm.

Trend 2 | From Passive Consumption to Food Citizenship

A powerful cultural shift is turning consumers into *participants* in the food system. Deloitte emphasises that sustainable food systems require citizen engagement, not just government policy or corporate action. Meanwhile, Brandwatch shows rising sentiment around “buying local,” “supporting farmers,” “fair trade,” and “quality over quantity.”

Urban, middle-class consumers increasingly see food as part of their identity. TrendWatching notes that people celebrate local products, from coffee and bakery goods to indigenous snacks, as sources of cultural pride.

> This creates a dual trend: localisation of tastes, and re-anchoring of agriculture as part of national identity.

People no longer simply “buy food;” they join online farming communities, subscribe to CSA - Community-Supported Agriculture- boxes, attend workshops on composting, learn about soil health, and choose outlets that help them feel part of a bigger system.

Food citizenship matters more when consumers:

- Experience climate anxiety
- Seek control over their food quality
- Distrust large corporations
- Want to support “makers” and “growers”
- Feel closer to the land through digital story-Building

This is not a niche activist movement, it is mainstream, practical, and grounded in daily habits.

CSA & Urban Farms

CSA models invite consumers to share the risks and rewards of farming. Urban farms, vertical-farm brands, and neighbourhood greenhouses deliver “hyper-local” produce with compelling transparency.

> TrendHunter highlights the growing role of indoor farms that combine technology and community experience, meeting consumer desires for freshness, locality, and connection.

Trend 3 | Digital Food Behaviours: Discovery, Dialogue and Demand Shaping

Today's food decisions begin long before entering a store. Consumers rely on digital platforms, influencer channels, recipe apps, social media trends, and short-form video recommendations. Brandwatch emphasises that social conversations increasingly drive purchase intent, trust, and switching behaviour.

People also use digital tools to:

- Check product origins
- Verify ethical claims
- Compare prices instantly
- Validate freshness and quality
- Learn about production methods
- Publicly reward or punish brand behaviour
- Explore new diets and lifestyles -from plant-forward to functional foods-

Agriculture brands and cooperatives are often missing from this digital arena—but the consumer expectation remains: *the story must be online*.

> The platform acts as a credibility check. People's food decisions flow through digital dialogue as much as through taste or habit.

Influencer-Led Food Transparency

Across markets, chef influencers and food educators play a role in demystifying agriculture. Videos showing regenerative fields, drone footage of farms, or "day in the life of a farmer" content receive millions of views.

This increased visibility not only shifts attitudes but democratises agricultural knowledge.

Food Citizen:

- Values -Sustainability, Fairness, Quality-
- Constraints -Cost, Time, Convenience-
- Motivators -Local Identity, Trust, Digital Influence-
- Behaviours -Switching, Supporting Local, Demanding Proof-

Trends in the Sector

Industry-wide developments transforming agriculture

Agriculture sits at the centre of major global forces: climate change, technology acceleration, geopolitical shifts, labour shortages, resource constraints and evolving consumer expectations.

These forces are restructuring the sector from the ground up, changing how land is used, how value is created, how supply chains operate and how brands compete.

Trend 4 | Regenerative Agriculture Moves from Niche to Norm

Regenerative agriculture is no longer an alternative practice—it is becoming the central organising philosophy for the future of food systems.

Deloitte's analysis describes how sustainable food systems could increase global food production by 9% while lowering prices by 16% if regenerative methods are scaled.

> Meanwhile, TrendHunter's profiles of ADM, PepsiCo, Cargill, and Kellanova show the exponential growth of large-scale regenerative initiatives.

Regenerative agriculture shifts the mental model from extractive to restorative. It includes:

- Soil restoration
- Biodiversity enhancement
- Reduced chemical inputs
- Agroforestry
- Cover cropping
- Minimal tillage
- Carbon sequestration
- Water retention

Arthur D. Little highlights that land-use pressures are driving rapid moves away from carbon-intensive processes, while regulators tighten requirements for soil health, emissions transparency, and environmental protection.

The trend is structural, not cosmetic. Agricultural players that continue with conventional intensive models face increasing risk of obsolescence.

PepsiCo & Cargill Regenerative Partnerships

Millions of hectares are being transitioned to regenerative methods through multi-stakeholder partnerships.

These efforts offer financial incentives, agronomist support, data tools, and market access. They prove that regenerative practices can increase resilience and decrease long-term input costs.

Trend 5 | AgTech, Automation and AI Become Agriculture's New Infrastructure

The agricultural sector is undergoing its most significant technological transformation in decades.

McKinsey estimates that generative AI and analytical AI could unlock around $250 billion across the agriculture value chain.

Key accelerating fronts include:

- Soil and crop analytics
- Precision irrigation
- Ai forecasting models
- Farm machinery automation
- Robotics for harvesting and transport
- Satellite-driven crop health monitoring
- Autonomous tractors
- Supply chain digital twins
- Climate-risk analytics
- Smart packaging

Deloitte predicts AgTech revenues reaching around US$18 billion in 2024, driven by sustainability and productivity pressures. Precision hardware adoption is already at high levels among progressive farming operations.

> TrendHunter illustrates this with real products like Kubota's all-terrain autonomous robot and AI-powered yield-prediction tools such as FruitCast.

Kubota KATR Robot & FruitCast AI Tool

These tools show how data and hardware combine to reduce labour dependence, improve planning accuracy, and mitigate risks linked to climate volatility.

They embody the shift from intuition-led farming to intelligence-augmented agriculture.

Trend 6 | Urban & Localised Food Systems Redesign Supply Chains

Cities are not simply destinations for agricultural products—they are becoming production centres. As climate instability increases, distributed and controlled-environment systems reduce vulnerability.

- TrendHunter highlights the growth of urban agriculture, vertical farms, and micro-greenhouses, driven by water efficiency, land scarcity and demand for hyper-local produce.
- Deloitte's Future of Food work argues that localised and regional supply chains reduce dependency on global logistics and mitigate risk from geopolitical disruptions.
- Gartner adds that water stewardship and automated supply-chain intelligence will become necessary capabilities for agricultural suppliers.

Urban agriculture both competes with and complements rural production. It creates:

- New distribution models
- New pricing structures
- New branding opportunities
- New consumer expectations for freshness
- New partnerships between technology providers, utilities, and municipalities

Indoor Farming Brands as Retail Ecosystem Partners

Many indoor farms co-brand produce with supermarkets, offering consistency that outdoor farming struggles to match in unstable climates.

> Their partnership with retailers creates data-rich feedback loops, enabling forecasting, personalised promotion, and real-time pricing.

Agriculture's Structural Transformation

- Regenerative: Restorative systems / Measurable nature impact
- AgTech / AI: Intelligence-augmented farming / Automation
- Urban Ag: Distributed production / Resilient supply chains

Trends in Brands

How brands across the agricultural value chain are innovating, communicating, and competing

Agriculture-linked brands -from input suppliers and cooperatives to food manufacturers and D2C produce brands- are operating in an environment where trust, transparency, and technological credibility matter more than ever.

> Brands must bridge the gap between consumer expectations and the realities of farming.

Trend 7 | Radical Transparency Replaces General Sustainability Claims

We have entered a "post-claim" era. People no longer accept vague statements like "eco-friendly" or "responsibly sourced."

Mintel reports increasing consumer scepticism toward sustainability messaging. Brandwatch confirms that sustainability conversation spikes often revolve around packaging waste, greenwashing, and distrust in certification.

Brands are moving toward:

- Publishing farm-level data
- Satellite-verified deforestation checks
- Soil health metrics
- Water use reporting
- Farmer income transparency
- Regenerative commitments
- Lifecycle analyses
- Third-party audits presented in plain language

WGSN's "Nature as CEO" frames this shift eloquently: brands must treat nature as a stakeholder and integrate ecological logic into governance, product decisions, and communications.

General Mills Regenerative Agriculture Dashboard

General Mills showcases soil carbon, biodiversity, and water metrics across its regenerative farming projects.

Gartner highlights the company's supply chain leadership for integrating sustainability deeply into operations, not just marketing.

Trend 8 | Brands Become Ecosystem Orchestrators

Agriculture brands are evolving from product providers into system builders. They orchestrate technology, data, finance, and partnerships.

McKinsey notes that value creation increasingly comes from integrated service stacks rather than standalone inputs.

These ecosystem roles often include:

- Digital agronomy tools
- Financing and risk-sharing solutions
- Carbon market access
- Farmer training
- Upstream–downstream traceability systems
- Marketplace platforms
- Multi-brand alliances supporting local institutions, as in step up for agriculture

Brandwatch reinforces this trend: brands that use social listening and stakeholder dialogue to shape decisions behave less like vendors and more like collaborators.

ADM & Kellanova Cotton Partnership

ADM and Kellanova support cotton farmers through incentives, training and data-sharing, reducing emissions and improving soil outcomes.

This collaboration demonstrates how brands can create end-to-end value systems that benefit farmers, corporations, and the environment simultaneously.

Trend 9 | Brand Trust Built Through Performance, Quality and Long-Term Value

Consumers and B2B buyers judge agricultural brands not just by ethics, but by consistent performance and resilience. Brand loyalty forms at the intersection of:

- Reliability
- Quality
- Transparency
- Relevance
- Affordability

Brandwatch reports that quality issues, particularly in grocery, drive switching more than sustainability does.

> Brands that demonstrate how sustainability improves product quality -taste, freshness, nutrition- stand out.

Agriculture brands must communicate:

- How regenerative practices improve flavour
- How digital tools increase reliability
- How sustainable methods reduce contamination risks
- How partnerships create stability in turbulent markets

Private-Label Regenerative Lines in Retail

Retailers introducing regenerative or organic private label produce at accessible prices have succeeded in turning intention into action.

> Consumers reward clarity, consistency, and fair pricing.

Brand Transformation Logic

- From: Product-centric, to: Ecosystem-centric
- From: Vague sustainability, to: Radical transparency
- From: Commodity positioning, to: Value + Impact positioning

Trends for People in the Sector

How behavioural shifts intersect the agricultural sector

Agriculture is no longer a low-tech, routine-intensive sector. It is increasingly a complex ecosystem that demands new skill profiles, new mindsets, and new tools.

The professionals working within this space, from farmers and agronomists to sustainability managers and supply-chain directors, are navigating immense complexity and rising expectations.

This chapter examines the human side of agriculture: how people in the sector are evolving, what they expect from brands and partners, and how they are redefining the future of agricultural practice.

Trend 10 | Farmers and Agri-Professionals Become Hybrid Tech–Sustainability Leaders

McKinsey's *Global Farmer Insights 2024* reveals a clear pattern: farmers are rapidly adopting new technologies, especially in markets where digital agronomy, remote sensing and precision hardware have become baseline enablers.

Where adoption once lagged, the gap is closing as tools become easier to use and more directly tied to profitability and risk management.

Meanwhile, climate volatility—droughts, floods, unprecedented heat spikes—has made resilience a core competency. Professionals in agriculture must now integrate:

- Agronomy
- Sustainability metrics
- Digital tools
- Data interpretation
- Financial literacy
- Risk mitigation
- Long-term scenario planning

Deloitte notes that AgTech and climate adaptation are reshaping farm decision-making, making it multidisciplinary by definition.

Arthur D. Little highlights the combination of agronomic expertise and water-risk management as especially crucial in regions with extreme conditions.

Professional Expectations Are Increasingly Digital-First

Our internal B2B analysis shows that professionals in industrial sectors expect:

- Personalised digital platforms
- Real-time data
- Seamless interfaces
- Transparent service levels
- Clear economic incentives
- Well-structured ecosystems

This expectation spills directly into agriculture. Whether they are interacting with seed companies, co-ops, commodity traders or AgTech platforms, agri-professionals want data-driven support that fits their workflows.

> They want clarity rather than complexity. They want platforms that help them succeed, not dashboards that overwhelm.

Kenya's Satellite-AI Smallholder Network

TrendHunter highlights a Kenya-based project where smallholders receive real-time satellite data on crop health. This model elevates the role of farmers from passive producers to data-enabled decision-makers, showing what the hybrid skill profile looks like in real-world practice.

Trend 11 | Risk Management Becomes a Core Professional Competency

Agriculture is experiencing a formalisation of risk management, from intuition-driven reactions to structured, analytical decision-making. Climate change, geopolitical tensions, and volatile input markets have accelerated this.

McKinsey's fertilizer industry analysis shows how demand forecasting now relies on climate scenarios, technological adoption rates and shifts in consumer demand.

Deloitte's sustainability-regulation work confirms that all agricultural organisation, from farmers to processors, must quantify physical and transition risks.

Professionals in the sector now integrate:

- Climate modelling
- Water-risk analysis
- Regulatory forecasts
- Input-price volatility
- Supply-chain fragility
- Labour shortages
- Shifting market preferences

Prophet's strategy work emphasises the need for multi-scenario planning to create resilient growth strategies, an approach increasingly applied in agricultural cooperatives and large agribusinesses.

Water-Scarcity Professionals in Hyper-Arid Regions

Arthur D. Little's analyses show how professionals in GCC countries and North Africa must redesign farming systems to respond to extreme water scarcity.

Their job extends far beyond agricultural operations: it includes analysing climate projections, adopting advanced irrigation tools, considering alternative crops, and interacting with water-governance institutions.

Trend 12 | A New Professional Identity: The Agriculture Systems Manager

A new archetype is emerging, professionals whose role spans agronomy, data, finance, compliance, sustainability, and stakeholder engagement. Instead of being "farm managers" or "technical advisors," they behave more like:

- Systems coordinators
- Data interpreters
- Impact communicators
- Partnership builders
- Risk strategists
- Technology integrators
- Regenerative transition leaders

This identity shift matters because it influences purchasing decisions, loyalty to suppliers and expectations of brands.

These professionals favour brands that help them manage complexity, reduce risk, and show real-world improvements—not those that merely supply products.

Trends for People with Brands

How audiences interact with agricultural brands

Agriculture-linked brands face a diverse set of audiences:

- Consumers -B2C / D2C-
- Professionals -B2B / B2B2C-
- Retailers and distributors
- Regulators, policymakers, NGOs and civil society

How these audiences relate to brands is evolving rapidly.

Trend 13 | Sustainability Is Expected, Quality and Price Drive Loyalty

There is a clear paradox: sustainability has become non-negotiable, yet it is rarely the primary loyalty driver.

Brandwatch's consumer data shows that while people value sustainable brands, they rarely stick with them if price or quality falters.

People now expect:

- Sustainable options
- Transparent production
- Responsible packaging
- Ethical sourcing
- Evidence-based claims

But loyalty behaviours follow:

- Affordability
- Product performance
- Reliability
- Availability
- Story-Building clarity

Mintel warns that sustainability fatigue is rising in some markets, as consumers feel frustrated when sustainable choices are hard to access or more expensive.

> Brands in agriculture must translate sustainability into quality: better flavour, safer products, fresher produce, stronger consistency.

Regenerative Private Label Produce

Retailers that launch regenerative or organic private-label products at accessible prices see rapid adoption. Clear labels, simple messaging, and modest premiums unlock demand from cost-sensitive but eco-conscious shoppers.

Trend 14 | Digital Conversations and Social Listening Shape Brand Trust

Brandwatch highlights that 42% of companies use social listening to inform business decisions. In food and agriculture, online conversations influence perceptions of ethics, quality, health, and sustainability.

People increasingly use digital platforms to publicly evaluate agricultural practices—even if they never visit a farm.

Digital conversations drive:

- Perceptions of pesticide use
- Concerns about animal welfare
- Debates about packaging waste
- Anger over misleading claims
- Excitement around innovative farming
- Desire for local sourcing
- Fear of contamination events

Agriculture brands must treat social media not as a marketing channel, but as a trust barometer. Listening is not optional—it is foundational.

The Co-op Using Social Listening for Food Policy

Brandwatch shows how The Co-op uses social listening to understand reactions to sustainability policies, ethical trade, and agriculture initiatives. Insights feed directly into decision-making—proving that digital dialogue can influence both product strategy and governance.

Trend 15 | People Want Connection to Farmers and Food Origins

TrendWatching, Mintel and Brandwatch collectively reveal that modern consumers crave authenticity, cultural connection, and transparency. They want to know:

- Who grew their food
- Where it came from
- How it was produced
- What sustainable practices were used
- How communities benefited

This is especially true for urban, middle-class audiences who value origin stories as part of lifestyle identity.

> Brands that humanise agricultural processes—through story-Building, farmer visibility, and behind-the-scenes content—gain trust and emotional equity.

Farmer-Led Story-Building Platforms

In several markets, produce brands and cooperatives use QR codes linking to farmer videos. This transforms everyday products into relationship experiences—bridging digital and physical worlds.

The New Brand–Audience Interaction Loop

Transparency, Trust, Engagement, Loyalty, Advocacy… and back to Transparency again

Trends for the Sector and Its Brands

Strategic implications for organisations operating in agriculture

The convergence of people, sector and brand trends generates structural consequences. Agriculture is entering a new era of value creation grounded in ecosystem logic, digital intelligence, and measurable impact.

Trend 16 | From Volume to Value, and Value to Impact

Agricultural players have historically focused on volume, yield, and cost efficiency. But the new ecosystem demands value that includes environmental, social, and long-term resilience metrics.

FAO and Arthur D. Little highlight the urgency: food production may need to rise by 60% by 2050, but resource use and emissions must decline.

Deloitte argues that sustainable systems could increase yields and reduce prices if executed well. McKinsey shows how AI-driven optimisation boosts productivity while reducing environmental impacts.

This creates a new strategic equation. Winning brands will:

- Manage soil as a strategic asset
- Link regenerative practices with financial outcomes
- Use data to validate impact
- Build resilience to climate volatility
- Position impact as a differentiator
- Align with national food security goals
- Report transparently on climate metrics

Nestlé and Unilever’s Regenerative Roadmaps

Both companies are transitioning to regenerative sourcing at scale. They link agricultural practices to broader net-zero commitments, and they publish interim progress and measurable indicators that influence stakeholder trust.

Trend 17 | Multi-Actor Ecosystems Replace Linear Value Chains

Gartner, Deloitte, Arthur D. Little, and McKinsey all converge on the same insight: ecosystems outperform linear chains. Agriculture is evolving from isolated silos into interconnected networks with shared incentives.

Ecosystems connect:

- Farmers
- Tech providers
- Input companies
- Governments
- Financiers
- Retailers
- Restaurants
- NGOs
- Consumers

We highlight how modern ecosystems hinge on strategic partnerships, digital platforms, and shared data layers.

Agriculture organisations must coordinate across actors to manage risk, accelerate regenerative transitions, and build new forms of value.

STEP Up for Agriculture Coalition

This multi-stakeholder initiative, with companies such as PepsiCo and Unilever, strengthens farmer support systems by funding local agricultural organisations. It proves that leading brands can use their power to enable bottom-up transformation.

Trend 18 | Data as the New Agricultural Currency

Data is becoming the most valuable asset in agriculture. It enables:

- Monitoring of soil carbon
- Optimisation of fertiliser use
- Forecasting of yields
- Proving compliance
- Enabling carbon credits
- Building climate models
- Designing insurance products
- Improving logistics
- Generating retailer insights

> Brands that master data integration and governance gain a durable competitive advantage.

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About Allegro 234

We catalyse conscious business growth through people, brands, and experiences.

We make your company worth admiring, creating value, improving results, and generating a positive social and environmental impact.

We create, drive, and transform your brand so that it is ahead socially and digitally.

We develop strategies that provide creative solutions, designs that can be integrated into your business and interim hands-on implementations.

Our solutions are focused on delivering:

- Living Brands: The brand as a strategic platform synthesizes its institutional purpose, business legacy, and aspirations.
- Innovative Culture: The path for meaningful and transforming experiences is based on business consciousness and co-creativeness.
- Impactful Marketing: To catalyse growth, information and technology must be subsidiary to an engaging experience that is fresh, positive, meaningful, and valuable.
- Connected Experiences: In our digitalised world, our purpose-driven and experience-based approach gives context and a human touch and drives growth.

Since its foundation in 2003, we have been working with companies such as AEBrand, Bodegas Montecillo, Bodegas Torres, Casa del Libro, Codorníu, Cosentino, Global Alliance for Banking on Values, Green Building Council, Grupo Lar, Impact Hub, Komoneed, Macri Group, Medinge Group, Osborne, Post-Industrial Institute, Repsol, Trasbordo, Uralita, Uriach and zenziya among others.

Also, Allegro 234 is part of The Flow Collective, a diverse group of highly experienced, blue-chip brand and strategy thinkers and doers, passionate believers in brands with purpose and conscience. Coming from three continents, its members have worked all over the world addressing some of the biggest strategy and branding challenges, in fields as diverse as FinTech, Telecom, Automotive, Healthcare and the Performing Arts.