Harnessing the Storm
Executive Summary

Harnessing the Storm covers our Future State of Ag Report which is a comprehensive examination of the macro drivers shaping the future for U.S. agriculture. The full report outlines each driver, considers associated impacts for U.S. agriculture and provides a timeline view of the likely evolution over the next 15+ years.

The future operating environment for U.S. agriculture will be defined by a convergence of the following six powerful macro forces, influencing both global demand and production.

- **Global Affluence**
- **Geopolitics**
- **Human Health**
- **Climate**
- **Technology**
- **Ownership**

As a result, American agriculture is in the midst of a structural change that will ultimately redefine how the industry competes – and innovates – on the world stage. These drivers create a "strategic window" for agricultural leadership, presenting both challenges and unique opportunities for U.S. farmers and ranchers to maximize their farm potential and increase competitiveness in a time of dynamic change.

Drivers Shaping Demand

Global Affluence

Rising affluence and population dynamics are changing demand patterns and shifting the global economic center of gravity. The expansion of the global consumer class represents one of the most significant economic shifts of the 21st century. As Asia becomes the epicenter of consumer demand, trade flows are increasingly orienting toward the Asia-Pacific region. It will not only reshape how and where goods are produced and traded but also define new dietary habits fueling demand for premium and health-oriented diets.

Geopolitics

Global competition in agriculture is intensifying, with Brazil, India, and Southeast Asia projected to produce nearly 40% of global commodities by 2030. At the same time, China continues to reduce its reliance on U.S. ag imports, favoring domestic production and diversifying sourcing, further weakening U.S. export influence. This shift aligns with the growing influence of the BRICS alliance with Brazil, Russia, India, China, and South Africa. The world order will become increasingly bifurcated between western-aligned interests and the east.

Human Health

The future of human health emerges as a powerful force reshaping agriculture and the food system. Rising healthcare expenditures, increasing rates of chronic disease, population aging, and equitable access to nutrient-dense foods are placing unsustainable pressure on health systems across the globe. For agriculture, this presents both a challenge and an opportunity: a chance to become a key driver of improved health outcomes and long-term economic resilience.

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Drivers Shaping Production

Climate

The economic impact of climate change on agriculture is already being felt through escalating crop insurance costs and water restrictions. As climate zones shift across the U.S., ag is experiencing a blend of emerging opportunities and mounting threats. Warmer temperatures and altered precipitation patterns are pushing plant hardiness zones northward. This shift could allow for the cultivation of high-value crops in regions previously too cold to support them. However, these gains are counterbalanced by new risks.

Technology

Over the next decade, technology adoption among U.S. farmers is expected to accelerate significantly. Access to high-quality, farm-generated data will be both an enabler and a challenge, making data governance and trust critical for widespread AI use. U.S. ag is poised to benefit from broader tech advancements, but so will other countries. Regulatory frameworks will play a decisive role. Pro-growth policies that clarify data rights, enable autonomous technologies, and expand connectivity will accelerate adoption.

Ownership

The foundation of agricultural productivity is shifting for farms. Land and machinery remain essential, but the real drivers of future growth are increasingly intangible—data, technology, and know-how. These assets, not physical capital, are set to define the next wave of value creation in agriculture. This evolution introduces a complex but vital frontier: intangible asset ownership. In this emerging landscape, control must become more fluid, but farmer ownership must remain firm.

Given the significant transformation that lies ahead, it will be critical for U.S. agriculture to reinforce technological leadership, strengthen market differentiation and build systems resilience. We also need to develop new solutions to help producers offset adoption risk and unlock their maximum farm potential.

Producers will need to prioritize business fundamentals as much as production to lay the foundation for a digital transformation and to seize opportunities that support growth and diversification. Idealyst's framework for Maximum Farm Potential supports business optimization for both farmers and their trusted advisors.

About the Future State of Ag Report

The full Future State of Ag Report is available to members of the Idealyst Innovation Foundry. Idealyst Innovation utilizes the Future State of Ag report as a foundational input into our Voice of the Farmer intel cycle, providing insight into the greatest opportunities for farmer-focused innovation. The report also helps farmers and ag leaders plan for future success and take action to stay competitive.

About Idealyst Innovation

Idealyst Innovation amplifies the voice of the farmer to cultivate and deliver innovation that makes them stronger. Our unique alliance unites trusted agribusinesses and solution providers across the agri-food value chain to foster a farmer-centric innovation ecosystem.

Send a note to contact@idealystinnovation.com to learn more about the Idealyst Innovation Foundry, our Maximum Farm Potential framework or to have a member of our team speak at an event.