



CULTIVATING SOLUTIONS FOR A SUSTAINABLE FUTURE



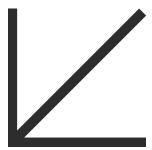
**REPORT
AGRICULTURE CHALLENGES
& NEEDS SURVEY
2025**

INSIGHTS FROM 57
AGRICULTURE BUSINESSES ACROSS 25
COUNTRIES

2025

CONTENT

- 01 EXECUTIVE SUMMARY
- 02 INTRODUCTION
- 03 SURVEY DEMOGRAPHICS
- 04 KEY CHALLENGES FACING AGRIBUSINESSES
- 05 SUPPORT NEEDS
- 06 BUSINESS GOALS
- 07 RECOMMENDATIONS
- 08 EMERGING TRENDS AND INSIGHTS



EXECUTIVE SUMMARY

The World Agriculture Forum (WAF) conducted the Agribusiness Challenges and Needs Survey to capture real-world experiences, constraints, and priorities of agribusinesses across the agricultural value chain. The survey aimed to elevate business voices and inform policy, investment, and development dialogue rather than produce statistically representative findings.

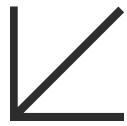
A total of 57 agribusinesses from 25 countries participated, including farmers, processors, input suppliers, and service providers. Most respondents were small enterprises (56%), reflecting the structure of the global agribusiness sector, followed by medium-sized (28%) and large firms (16%). Participation spanned both emerging and mature businesses, with 37% operating for one to five years and 33% for over a decade. Notably, 74% of respondents operate internationally, highlighting the growing integration of agribusinesses into global markets.

Access to finance and credit emerged as the most pressing challenge, followed by price volatility, high input costs, limited market access, and climate change impacts. Regulatory barriers, supply chain disruptions, and skills shortages further constrained business growth. These challenges reflect broader global trends, particularly for small and medium enterprises navigating financial, structural, and environmental pressures.

In response, businesses overwhelmingly prioritized financial support, particularly grants, subsidies, venture capital, and low-interest loans, underscoring the need for blended financing models. Other key needs included training, market linkages, and policy advocacy.

Despite constraints, respondents expressed strong optimism and growth ambitions, including expanding production, entering new markets, and adopting new technologies. The survey generated 219 practical recommendations, emphasizing finance, infrastructure, partnerships, trade facilitation, capacity building, and regulatory reform.

For WAF, these findings reinforce its role as a platform linking policy, practice, and investment, ensuring that global agribusiness strategies are grounded in the lived realities of enterprises worldwide.



INTRODUCTION

The world is at a critical point in agricultural development: growing population, climate uncertainty, resource limitations, and fluctuating markets require that agribusinesses evolve rapidly. As a global convening platform, the World Agriculture Forum (WAF) aims at raising the voices of agribusiness stakeholders from farmers and processors to investors and policymakers, and bring these voices together with policy, innovation, and implementation.

WAF operates under its mandate of "Cultivating Solutions for a Sustainable Future" by bringing together governments, private sector, civil society, and research organizations as catalysts for shifts in food systems. The engagement of the organization covers global strategies and their execution locally with tools such as WAF Country Councils that translate global thinking into action at country levels.

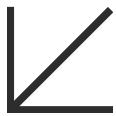
In 2025, with the future programs of WAF set on foundations of current realities from the world's agribusinesses, WAF commenced the Agribusiness Challenges & Needs Survey. Through a 3-5-minute survey, business owners, managers, and agribusiness stakeholders globally were invited to share their greatest challenges, the severity of those challenges, support needs, and future aspirations. The intent: to track trends, not test statistical hypotheses, and to inform WAF's engagements with policymakers, donors, and sector actors.

This report delineates the trends and patterns observed from the survey responses. It identifies the challenges that are most frequently mentioned, assesses the severity with which they are regarded, examines variations by business type or geographic region, and outlines the forms of assistance that agribusinesses perceive as most beneficial.

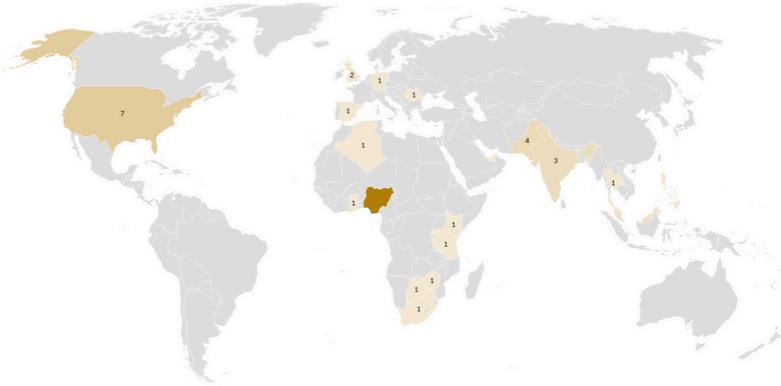
As others have noted, access to finance, infrastructural gaps, regulatory hurdles, and skill shortages have been consistent problems in farm development globally and within developing economies. In African experiences on farm investment for instance, access to finance usually dominates the litany of constraint facing growth. While digital tool use in agriculture remains negligible without proper infrastructure, policy support, and capacity, it remains so. Against this background, this current questionnaire gives a new perspective based on practitioner guidance on the pressures facing agribusinesses, support systems they prefer, and their future hopes.

03

SURVEY DEMOGRAPHICS



3.1 Geographic Distribution



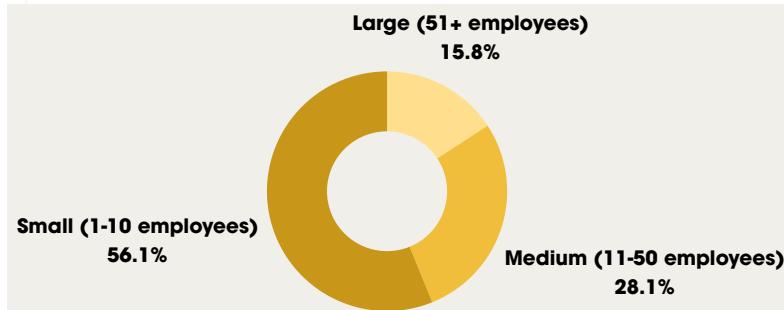
A total of 57 agribusinesses from across the world participated in the WAF Agribusiness Challenges Survey. The responses came from 25 countries, reflecting a broad geographic diversity and ensuring that the findings capture perspectives across different contexts of agribusiness.

The largest representation came from Nigeria, with 20 businesses (about 35% of all respondents). This strong participation highlights Nigeria's dynamic agribusiness sector and its interest in shaping global agricultural dialogue. The United States followed, with a combined 7 businesses (5 listed as "United States" and 2 as "USA"), reflecting North America's engagement in global agribusiness issues. Other countries with notable participation include Pakistan (4 businesses), India (3 businesses), and Malaysia, Singapore, and the United Kingdom (2 businesses each).

The remaining countries ranging from Brazil, Spain, Germany, South Africa, and Australia to Papua New Guinea and the

Philippines each contributed one business, demonstrating the global nature of the survey outreach.

3.2 Business Size

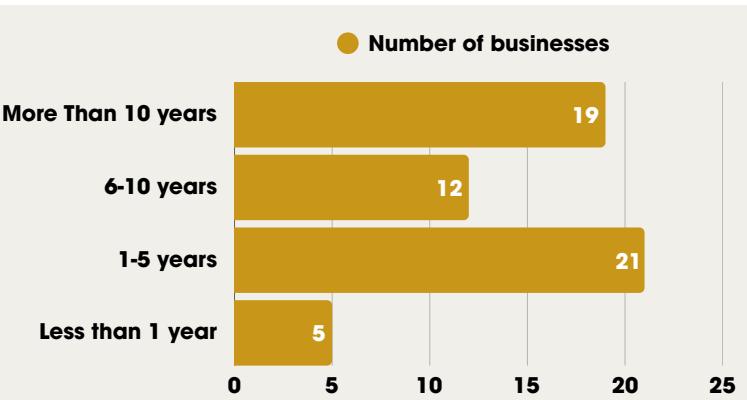


Most surveyed agribusinesses are small enterprises. Of the 57 respondents, 32 businesses (56 percent) employ between 1 and 10 people. This reflects the central role of smallholder and family-run enterprises in global agribusiness and highlights the importance of their perspectives, particularly on access to finance, inputs, technology, and markets. Medium-sized enterprises accounted for 16 respondents (28 percent). These businesses are typically in a growth phase, facing both opportunities and constraints as they seek to scale operations and strengthen market linkages.

Large enterprises, employing more than 51 people, were the least represented, with 9 respondents (16 percent). While fewer in number, they contribute important insights related to regulation, skilled labor, and operating at scale.

Overall, the findings largely reflect the realities of small and medium-sized agribusinesses, while still capturing perspectives from larger players in the sector.

3.3 Years of Operation



The survey captured businesses at different stages of maturity. Twenty-one respondents (37 percent) reported operating for 1-5 years, indicating strong participation from relatively young enterprises navigating early-stage challenges such as start-up finance and market access.

Twelve businesses (21 percent) have been operating for 6-10 years and are generally in a consolidation or expansion phase. Nineteen respondents (33 percent) reported more than 10 years of operation, offering insights into long-term sustainability, regulatory environments, and market diversification.

Five businesses (9 percent) were less than one year old, reflecting emerging start-ups and highlighting barriers to entry for new agribusiness ventures.

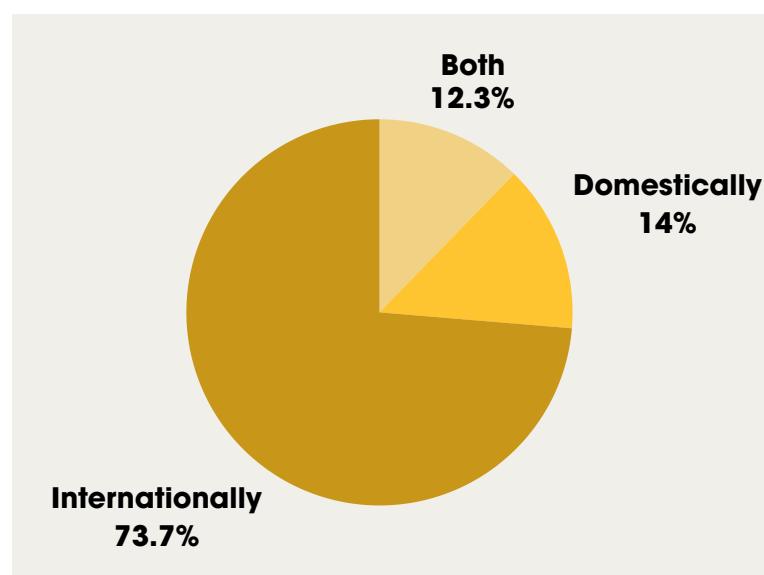
Together, this spread provides a balanced view of challenges across early, mid, and mature stages of agribusiness development.

3.4 Primary Area of Operation

Most surveyed agribusinesses have a strong international focus. Forty-two respondents (74 percent) reported operating primarily at the international

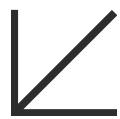
level, underscoring the global nature of modern agribusiness and the importance of cross-border trade and partnerships.

Eight businesses (14 percent) operate mainly in domestic markets, playing a key role in national food systems and local value chains. Seven respondents (12 percent) reported operating both domestically and internationally, reflecting businesses in transition as they expand beyond local markets.



Overall, the mix of international, domestic, and dual-market operations provides useful insights into how agribusinesses operate and scale across different market contexts.

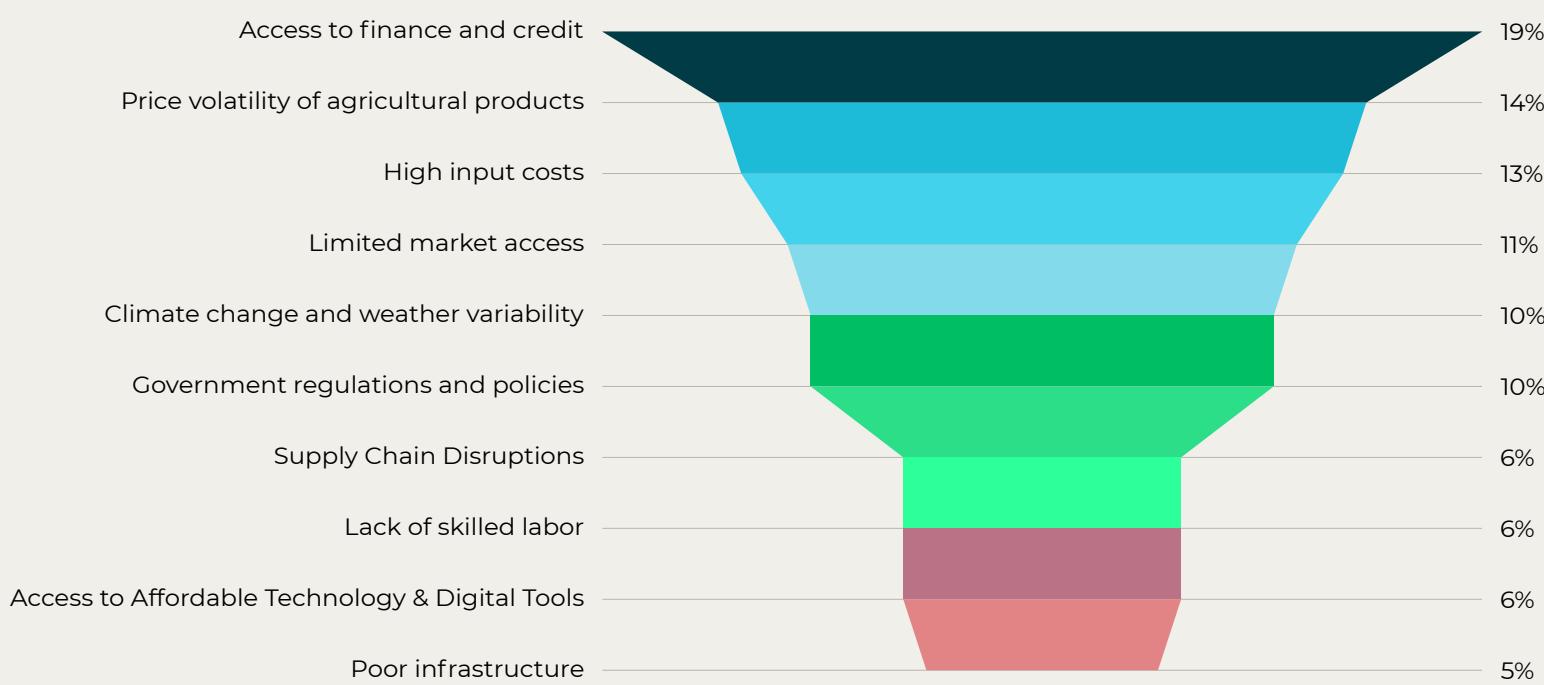
04



KEY CHALLENGES FACING AGRIBUSINESSES

The survey highlighted a diverse range of challenges confronting agribusinesses across the globe, with many respondents identifying more than one issue. A total of eighty-nine challenge mentions were recorded across fifty-seven businesses, underscoring the fact that enterprises face multiple, interlinked constraints in their operations.

Price volatility of agricultural products was the second most frequently reported challenge, with eleven mentions. This reflects the high sensitivity of agribusinesses to fluctuations in global commodity prices, domestic market swings, and unstable supply-demand dynamics. For smallholders and processors alike, volatility undermines



The single most frequently cited challenge was access to finance and credit, mentioned by sixteen businesses. This aligns with broader evidence that financing remains a critical bottleneck for agribusinesses of all sizes, particularly small and medium enterprises that lack collateral, financial literacy, or formal banking relationships. Without adequate financing, businesses struggle to invest in improved inputs, expand operations, or weather shocks.

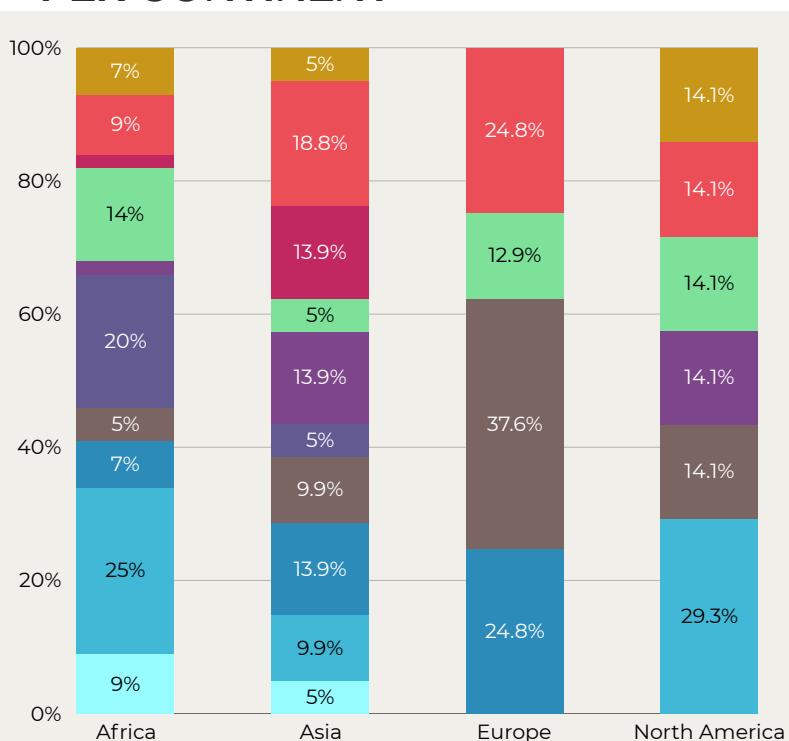
planning and profitability. Closely related, high input costs were cited ten times. Respondents emphasized the rising costs of seeds, fertilizers, feeds, and machinery. These costs squeeze already thin margins, especially in environments where producers have little power to pass costs on to consumers. Limited market access and climate change impacts were also recurring challenges, each mentioned nine times. Market access barriers ranged from

inadequate infrastructure and limited buyer linkages to trade restrictions, while climate change impacts reflected both unpredictable weather patterns and the increasing frequency of shocks such as droughts and floods.

Other commonly reported issues included government regulations and policies (8 mentions), supply chain disruptions (6 mentions), lack of skilled labor and access to digital tools (5 mentions each), and poor infrastructure (4 mentions). Less common but still important were challenges like pest and disease outbreaks and resource gaps for service delivery.

Taken together, these findings show that while finance remains the most pressing challenge, agribusinesses are grappling with a web of constraints that are structural (infrastructure, regulations), environmental (climate change, pests), and market-driven (price volatility, limited access). The diversity of issues points to the need for comprehensive, multi-stakeholder solutions that address both immediate financial needs and systemic barriers.

AGRI-BUSINESS CHALLENGES PER CONTINENT



The chart shows that agribusiness challenges vary by continent, but access to finance, climate risks, and regulatory pressures cut across regions.

In Africa, the most prominent challenge is access to finance and credit, followed by high input costs and limited market access, highlighting constraints faced by small and medium enterprises operating with limited capital and infrastructure.

In Asia, challenges are more evenly distributed. Price volatility, lack of skilled labor, and high input costs stand out, suggesting pressures from market fluctuations and workforce capacity alongside production costs.

In Europe, government regulations and policies dominate, accounting for the largest share of reported challenges. This reflects the complexity of regulatory compliance in more mature and tightly regulated markets, alongside notable concerns around climate variability and price volatility.

In North America, access to finance and credit and high input costs are the most significant challenges, with market access, price volatility, and infrastructure-related issues also featuring prominently.

Overall, the results show that while financial and cost-related challenges are widespread, policy and regulatory issues are more pronounced in Europe, and market access and finance constraints are more acute in Africa, underscoring the need for region-specific policy and investment responses.

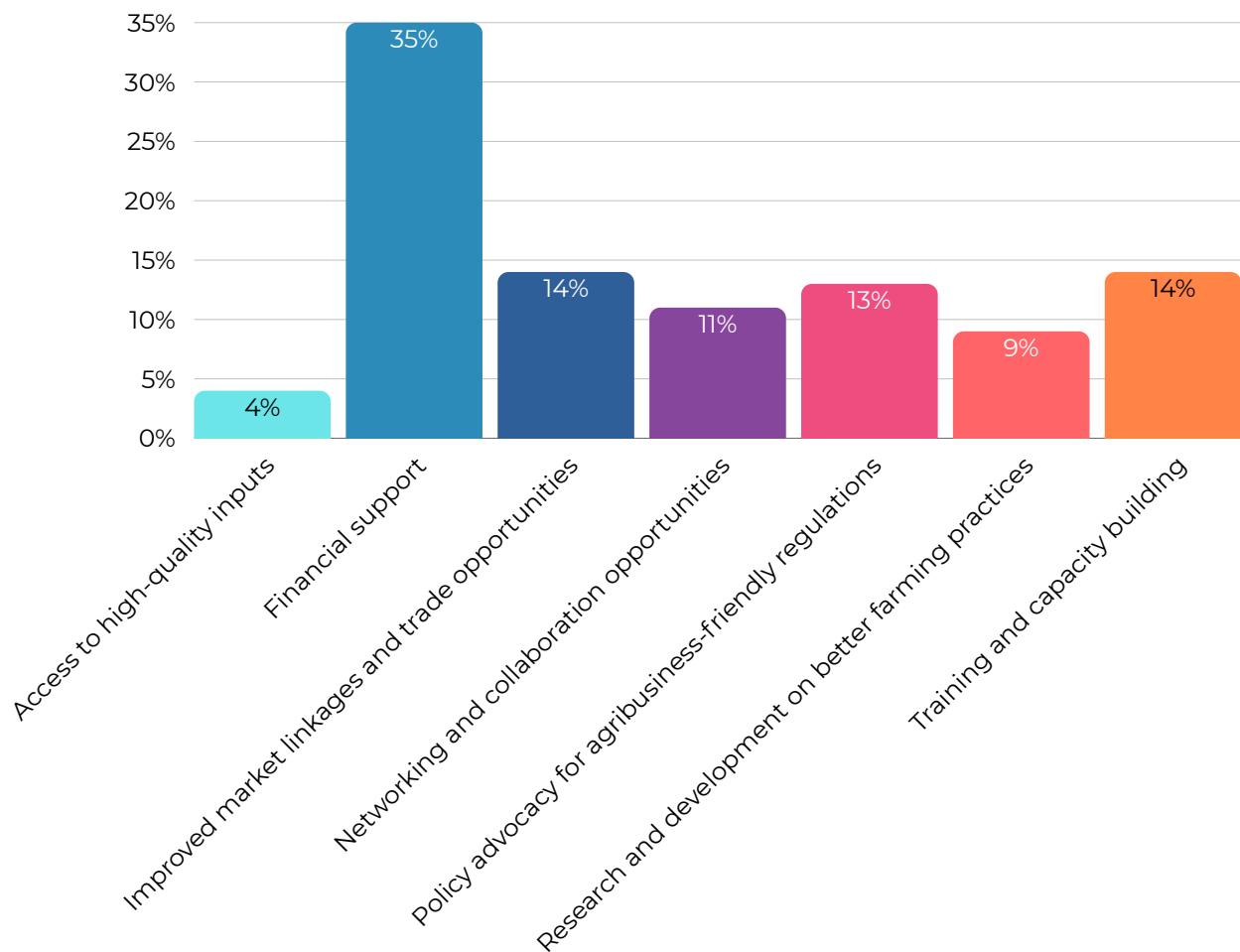
- Access to Affordable Technology & Digital Tools
- Access to finance and credit
- Climate change and weather variability
- Government regulations and policies
- High input costs
- Lack of skilled labor
- Limited market access
- Poor infrastructure
- Price volatility of agricultural products
- Supply Chain Disruptions

SUPPORT NEEDS

The survey asked agribusinesses to identify the types of support that would be most valuable in addressing their challenges. A total of eighty-two support needs were recorded, reflecting the fact that businesses often require more than one form of intervention to thrive.

low-interest loans, and venture capital. Without this financial foundation, many businesses noted that other support mechanisms would have limited impact. Beyond finance, training and capacity building and improved market linkages and trade opportunities were each

Support Needs



The most dominant need was financial support, identified twenty-eight times. This aligns closely with the top challenge of access to finance and highlights the urgency of improving access to capital. Respondents emphasized a preference for affordable and flexible financing instruments, including grants, subsidies,

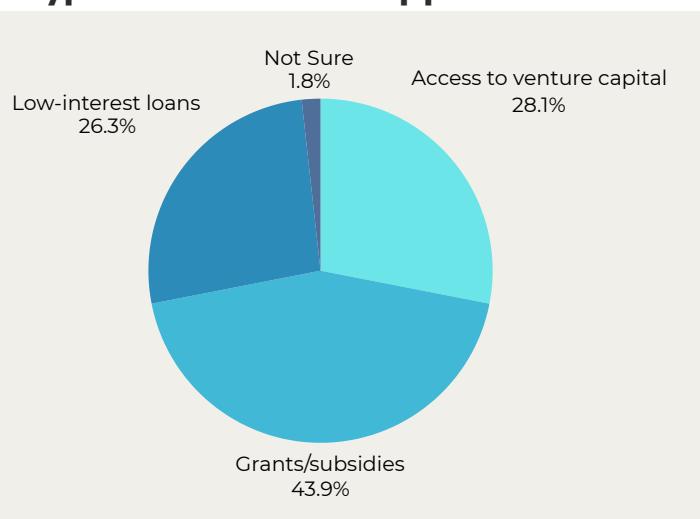
mentioned eleven times. These responses underline the importance of strengthening the knowledge base and skills of agribusiness owners and managers, as well as ensuring they can connect to profitable markets both domestically and internationally. Enhanced training in business

management, digital skills, and sustainable farming practices was specifically highlighted as a way to build resilience.

Policy advocacy for agribusiness-friendly regulations was another key need, cited ten times. Respondents stressed the importance of reducing bureaucratic hurdles, streamlining licensing processes, and fostering a regulatory environment that enables innovation and investment. Other forms of support identified included networking and collaboration opportunities (9 mentions), research and development into better farming practices (7 mentions), promotion of digital tools and farm management systems (2 mentions), and access to high-quality inputs such as seeds, fertilizer, and machinery (3 mentions).

Taken together, these responses paint a clear picture: while financial support is the most pressing and widely shared need, agribusinesses also want enabling conditions that include knowledge transfer, better markets, innovation, and supportive policies. This suggests that holistic solutions blending financial instruments with capacity building, regulatory reform, and market facilitation will be most effective in meeting the sector's needs.

Types of Financial Support



When asked to specify the forms of financial support that would be most beneficial, respondents provided clear preferences. Out of the fifty-seven businesses surveyed, the largest share, twenty-five businesses (44 percent) identified grants and subsidies as their preferred financial support mechanism. This highlights a widespread demand for accessible, low-risk funding options that can help businesses overcome entry barriers, reduce vulnerability to shocks, and build resilience without the burden of high repayment costs.

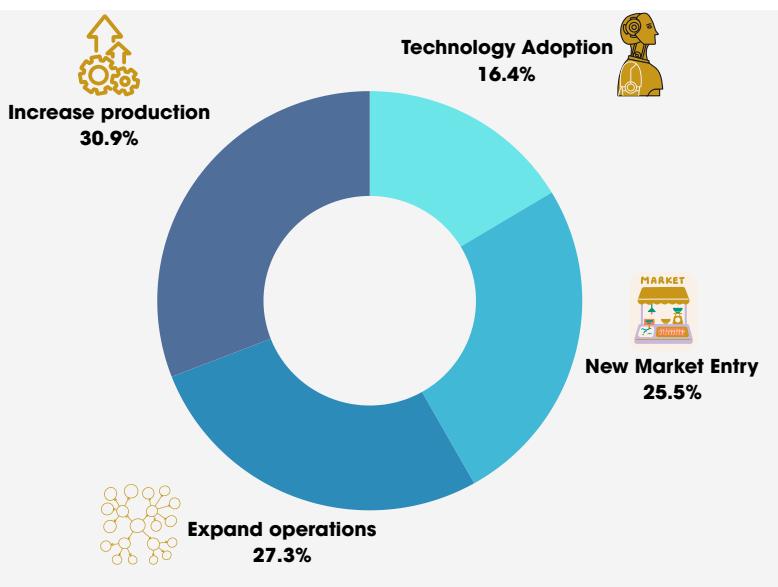
A significant proportion, sixteen businesses (28 percent), expressed a preference for access to venture capital. This finding is notable because it reflects a growing appetite among agribusinesses for equity-based financing and partnerships that not only provide capital but also bring technical expertise and networks. The interest in venture capital suggests that many agribusinesses, particularly those with innovative or high-growth potential, are eager to scale their operations beyond traditional financing models.

Meanwhile, fifteen businesses (26 percent) indicated that low-interest loans would be their preferred form of support. For these enterprises, affordable credit remains essential to expand production, acquire modern equipment, or strengthen supply chains. However, the demand for concessional terms highlights that conventional lending practices often characterized by high interest rates and collateral requirements are viewed as prohibitive.

Only one respondent reported "not applicable," confirming that virtually all agribusinesses see financial support as fundamental to their sustainability and growth.

BUSINESS GOALS

The survey asked respondents to share their primary goals for the next five years, providing a window into how agribusinesses envision their growth and evolution. The responses reveal that most businesses are looking toward expansion, innovation, and market diversification, with relatively few expressing uncertainty about their future direction.



The most frequently cited goal was to increase production capacity, identified by seventeen businesses (30 percent). This reflects the ambitions of many agribusinesses to scale up their operations, boost output, and meet growing demand in both domestic and international markets. For these businesses, expansion often depends on access to finance, improved inputs, and stronger infrastructure.

Closely following, fifteen businesses (26 percent) reported that they aim to expand operations more broadly. This suggests goals that go beyond production volume, encompassing

geographic expansion, diversification into new product lines, and integration into higher-value segments of the agricultural value chain.

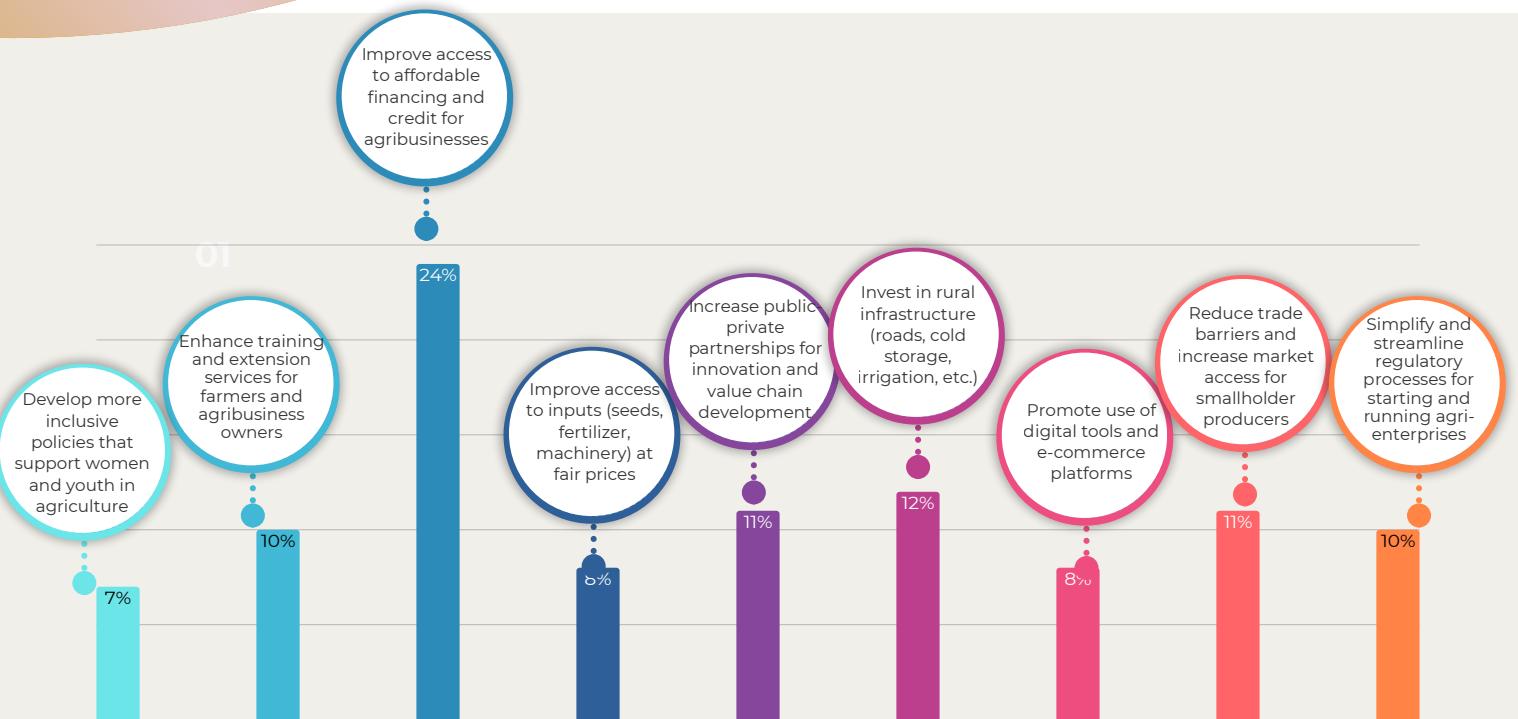
Another important priority was entering new markets, mentioned by fourteen businesses (25 percent). This goal underscores the strong international orientation seen elsewhere in the survey, as agribusinesses increasingly look for opportunities beyond their immediate local or national context. For many, this involves tapping into regional and global markets, overcoming trade barriers, and building partnerships that enable cross-border trade.

Innovation also emerged as a central theme, with nine businesses (15 percent) aiming to adopt new technologies in the coming years. Respondents emphasized the need to integrate digital tools, mechanization, and improved farm management systems to enhance efficiency, sustainability, and competitiveness.

Only two businesses (3 percent combined) reported either being unsure about their goals or focusing on supporting high-growth potential companies, showing that uncertainty is relatively rare among respondents.

Taken together, these findings suggest that agribusinesses are forward-looking and growth-oriented, with the majority prioritizing scaling and expansion while also recognizing the importance of innovation and technology adoption.

RECOMMENDATIONS



In addition to identifying their challenges and support needs, respondents were asked to share recommendations for improving the agribusiness environment in their regions and more broadly. The responses were rich and diverse, with 219 individual recommendations captured across the 57 businesses surveyed. This volume of input underscores the urgency felt by agribusinesses and the wealth of practical ideas they bring to policy discussions.

The most frequently cited recommendation was the need to improve access to affordable financing and credit, raised 53 times. This reinforces finance as the dominant theme throughout the survey, reflecting both the constraints businesses face and the widespread belief that better access to capital is essential to unlocking growth. Businesses emphasized the need for low-

interest loans, accessible grants, and innovative financing schemes tailored to the realities of agribusiness.

A strong emphasis was also placed on investing in rural infrastructure, mentioned 26 times. Respondents pointed to gaps in roads, cold storage facilities, irrigation, and logistics systems as major obstacles to efficiency and competitiveness. Better infrastructure, they argued, would lower costs, reduce post-harvest losses, and improve market access for farmers and processors alike.

Increasing public-private partnerships (PPPs) for innovation and value chain development was another common recommendation, with 24 mentions. Respondents see PPPs as a way to leverage private sector dynamism alongside public sector investment and support, particularly in areas such as research, technology adoption, and

building inclusive value chains.

Market-related issues were also highlighted, with 23 respondents calling for reduced trade barriers and increased market access for smallholder producers. This reflects the broader challenge of integration into regional and global markets, where businesses face tariffs, quotas, and other regulatory hurdles.

Capacity development was also emphasized, with 21 mentions for enhancing training and extension services for farmers and agribusiness owners. Respondents stressed the importance of equipping entrepreneurs and producers with the skills needed to adopt modern practices, improve productivity, and manage businesses effectively. Similarly, 21 recommendations focused on simplifying and streamlining regulatory processes, pointing to frustrations with bureaucracy and the need for a more enabling business environment.

Other recommendations included the promotion of digital tools and e-commerce platforms (17 mentions) and improving access to inputs such as seeds, fertilizers, and machinery at fair prices (18 mentions). Respondents see digital transformation and affordable inputs as critical enablers of productivity and resilience.

EMERGING TRENDS AND INSIGHTS

The results of the survey point to several clear and interconnected trends shaping the current and future trajectory of agribusiness globally. While the responses highlight diverse experiences across countries, business sizes, and years of operation, some common themes consistently emerge.

The first and most striking trend is that finance remains the single greatest barrier to growth across agribusinesses of all types. Whether in the form of start-up capital for new ventures, working capital for small enterprises, or investment financing for scaling operations, access to affordable and appropriate finance was the most frequently cited challenge, support need, and recommendation. This underlines the need for innovative financing models that are inclusive of small and medium enterprises while still attractive to larger, growth-oriented firms. A second major trend is the high cost and volatility of production inputs and outputs. Rising input costs and unstable commodity prices were repeatedly highlighted as barriers to stability and profitability. These challenges are exacerbated by limited market access, which leaves businesses vulnerable to price swings and unable to fully capture value from their products. Together, these issues highlight the structural vulnerability of agribusiness to both local and global economic forces.

Climate change and environmental stresses also emerged as a critical concern. Respondents frequently

mentioned unpredictable weather, pest and disease outbreaks, and broader climate impacts as severe challenges. This aligns with global evidence that climate change is a growing threat to food systems and requires both adaptation strategies at the farm level and systemic investments in resilience, such as irrigation and climate-smart technologies.

The survey further highlights that policy and regulatory environments are viewed as both a constraint and an opportunity. Respondents pointed to restrictive regulations, complex procedures, and weak enforcement as challenges, while also calling for more agribusiness-friendly policies, streamlined processes, and stronger public-private partnerships. This dual perspective shows that while the regulatory space is often a bottleneck, it is also seen as a lever for systemic change if governments adopt reforms.

Another key insight is the growing recognition of the role of innovation and digital transformation. Many businesses identified the adoption of new technologies and digital tools as a priority for the next five years, while also recommending stronger investment in digital solutions and e-commerce platforms. Although current adoption rates are relatively low, the aspiration to integrate technology suggests a forward-looking orientation that, if supported, could accelerate productivity and competitiveness.

Finally, the responses point to a resilient and growth-oriented mindset among agribusinesses. Most businesses, whether small start-ups or larger enterprises, expressed ambitions to expand operations, increase production, and enter new markets. This optimism, even in the face of structural challenges, reflects the entrepreneurial energy driving the sector and the potential that can be unlocked through targeted support and enabling environments.

The emerging trends suggest that agribusiness globally is constrained by finance, markets, and infrastructure, challenged by climate change and regulations, but also energized by opportunities in technology, partnerships, and growth-oriented strategies. The findings call for integrated solutions that go beyond single-issue interventions to address the multiple, interconnected barriers faced by businesses.



About the World Agriculture Forum (WAF)

The World Agriculture Forum is a global platform connecting diverse stakeholders to drive sustainable agricultural development through policy advocacy, trade facilitation, and technology-driven solutions. WAF unites governments, farmers, agribusinesses, experts, and development institutions to bridge implementation gaps and drive sustainable agriculture and food systems transformation towards a resilient, food-secure future. With a strong focus on collaboration, innovation all along the value chain, and public-private partnerships, WAF is committed to transforming agriculture worldwide.