

2026

Business and supply chain
collaboration drives progress

State of Ag Resilience

Report prepared by:



Companies are using
climate risk to guide
investment, wrestling
with data access
across supply chains
and working to
establish landscape
level partnerships.

Contents

Findings

Executive summary	03
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04

Regen ag moves from ESG to enterprise risk management.	04
The question isn't what data to collect. It's how.	11
The case for landscape action is settled. The operating model isn't.	18
Carbon removals are moving mainstream.	23

Moving from insight to action

27



Executive summary

The 2026 State of Agriculture Resilience survey shows clear progress in regenerative agriculture programs, alongside persistent constraints. From our survey of more than 20 organizations across the global food and ag sector, four signals stand out that will define the year ahead:

- Climate risk is being used as a decision-making input, not just a disclosure requirement.
- Companies know what data they need, but still struggle to access it across supply chains.
- Collaboration is gaining traction, but scale depends on clearer incentives, roles, and measurement.
- Carbon removals are becoming mainstream.

Together, these findings point to an industry that understands the need to build resilience but is still figuring out how to execute at scale. The companies making the most progress are those aligning climate risk assessment with investment decisions, building fit-for-purpose data systems, and designing partnerships that reduce complexity rather than add to it.

This report dives deeper into these four levers, exploring where the industry stands today and highlighting the tactics most likely to drive progress in 2026.

20+ global companies surveyed across CPG, research and agriculture services.

Important term:

resilience

At Regrow, we define resilience as 'social, economic, and supply chain stability across our food system.' Resilience ensures our farmers maintain economically stable businesses, companies fortify commodity supply chains against climate risk, and our planet endures for future generations.

Theme 1

Regen ag moves from ESG to enterprise risk management

Regen ag moves from ESG to enterprise risk management

This year climate risk assessments are playing a much bigger role in how companies prioritize regen ag investments and how they make core sourcing and procurement decisions.

Climate risk assessments were once treated as required disclosures for investors, but leading companies are now using them as active decision-making tools.

“When we look at our risk assessments, we don’t just see a stakeholder report. We see opportunities to diversify suppliers across high-risk regions and scale regen ag programs for our biggest ingredients,” said one survey respondent.

Our survey shows that 60% of leaders in regen ag are using climate risk assessments to guide program investment, sourcing decisions, and/or procurement strategies. These leaders are deploying programs as practical levers for managing climate exposure in high-risk crops and regions, stabilizing long-term supply, and supporting farmers amid increasing volatility.

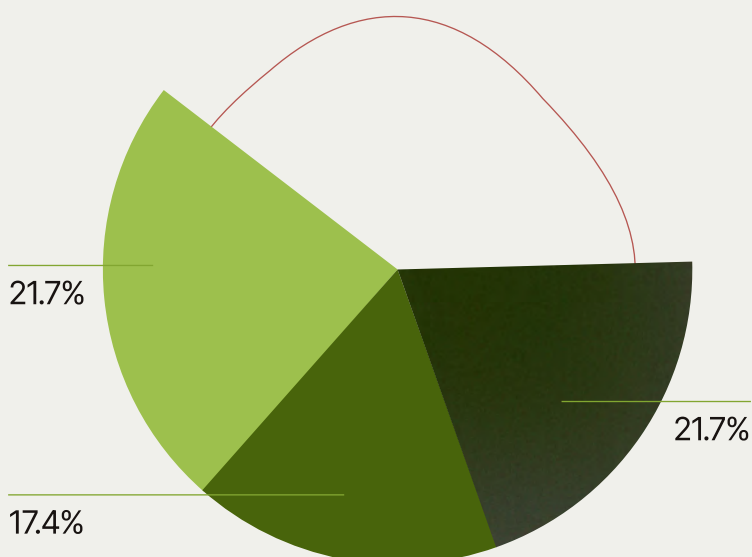
Important term:

climate risk assessment

A climate risk assessment is an analysis of current and future risks from climate change across a company’s sourcing regions and/or ingredient supply chains.

Does your company use climate risk assessment to guide strategic decisions?

-  We are using climate risk to guide procurement strategy and justify investment in regenerative programs
-  Climate risk assessments guide our investment in regen ag programs
-  Climate risk guides our sourcing decisions (e.g. sourcing from regions with more security and/or less climate risk)
-  Not yet exploring this





From risk disclosure to ROI analysis

These findings reinforce something we see more and more across customer conversations: companies that can quantify climate risk are better positioned to justify return on investment (ROI) and scale regenerative agriculture programs. Climate risk assessments help quantify supply instability, price volatility, and reputational risk, while surfacing opportunities for resilience, enhanced biodiversity and water quality, and support for farmer livelihoods. Each of these variables contributes to the ROI calculation for programs.

A comprehensive view of ROI is critical to scale regenerative practices to a point of true resilience. When risk assessments are used actively, they help companies prioritize the crops and regions where intervention will matter most, align investments with procurement needs, and demonstrate value across business units.

Recent examples illustrate how climate risk, regenerative action, and ROI intersect in practice. [Unilever has shared](#) that without its regenerative agriculture programs, the company would have faced yield losses of up to 40% and significant shortages due to drought in certain sourcing regions.

Climate risk assessments are vital because they can shift the conversation from awareness to action. By estimating the cost of inaction and identifying where climate hazards pose the greatest threat, companies can:

- Target regenerative investments where they will protect supply reliability
- Quantify avoided losses during extreme weather events
- Strengthen the business case for short-term sourcing decisions and long-term regenerative programs

Understanding and articulating ROI is essential to scaling regenerative agriculture. Used actively, climate risk assessments are among the most effective tools companies have to connect climate exposure to business decisions.

Farms employing regenerative practices showed greater yield resilience, materially reducing Unilever's exposure to supply shortfalls and emergency sourcing costs.

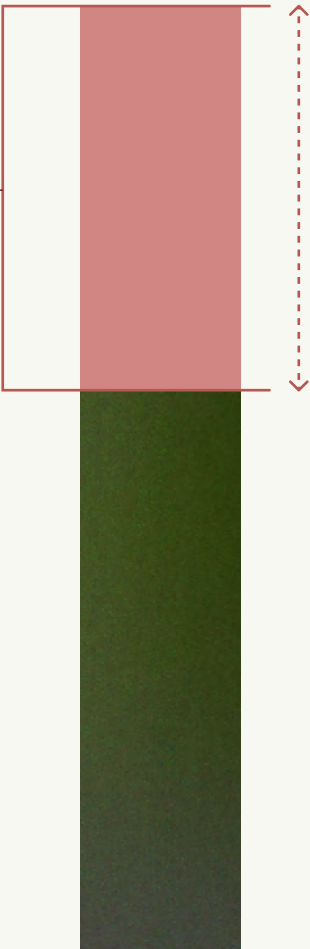
How to act on these insights

01 Provide a clear picture of where we stand today, including sustainable and regenerative practice adoption, evolving policies, and the economic impacts of climate change on supply chains.

02 Highlight four critical strategies for advancing resilience, supported by insights from industry leaders who are already taking action, as well as Regrow's experience working with companies across the value chain.

Not yet using climate risk assessments to guide company strategy.

38.1%



What about those who haven't explored risk assessments?

Despite growing momentum, nearly 40% of respondents report that they are not yet using climate risk assessments to guide company strategy.

For some, climate risk analysis has remained a compliance-oriented disclosure exercise. For others, limited data, internal alignment challenges, or uncertainty about where to start have slowed adoption.

Benchmarks outside our surveyed audience reinforce this finding. Analyses from organizations such as [Ceres](#) and the [Food Emissions 50 Company Benchmark](#) show steady progress in climate risk disclosure and scenario analysis across the food and agriculture sector, but more limited adoption of quantified transition plans and risk-informed investment strategies. In many cases, climate risk is identified, but not yet integrated into core decision-making.

For companies in this 40% — don't think about climate risk as adding another to-do. Think of it as a new source of insight to better understand your supply chain.



How to get started

Companies don't need a mature climate risk assessment framework to begin. The most effective approaches start with targeted analyses, relevant to the most important decisions in an organization.

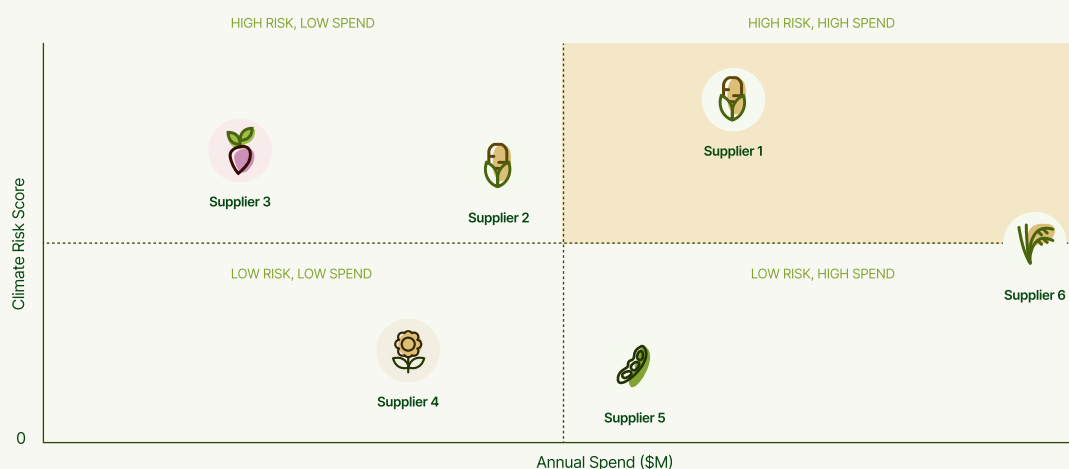
01 Start with priority crops and regions

Highlight four critical strategies for advancing resilience, supported by insights from industry leaders who are already taking action, as well as Regrow's experience working with companies across the value chain.

02 Start thinking about procurement and sourcing opportunities

Link your assessment — whether it's one crop, one region or multiple — directly to sourcing strategy. Find an opportunity for supplier diversification, contract changes, or regional investment planning. This shift helps you move risk analysis from passive to active.

See the risk/spend matrix below. This shows how a company might assess the climate risk associated with specific ingredients. This grid can make spending decisions and supplier partnerships much easier to navigate.



03 Connect risk to regenerative practice selection

Overlay climate hazard data with current practice adoption to identify where regenerative practices can most effectively reduce exposure. This helps prioritize interventions that address specific risks.

04 Quantify the cost of inaction

Even directional estimates like emergency sourcing costs can strengthen the business case for investment. See if any insights from your initial risk assessment can help your team understand the cost of inaction.

Risk assessment can be done in pieces

Climate risk assessment does not need to be an all-or-nothing endeavor. Just getting started will help you identify quick wins.

When used intentionally, early-stage risk analysis can help companies:	Identify financially material risks and dependencies in sourcing regions	Prioritize regenerative investments with the greatest risk-mitigation impact
	Demonstrate credible ROI to internal stakeholders and investors	Align sustainability initiatives more closely with core business strategy

Without this foundation, regenerative agriculture efforts risk remaining fragmented or under-resourced. With it, climate risk assessments become a practical tool for strengthening resilience, guiding investment, and preparing for a more volatile future.

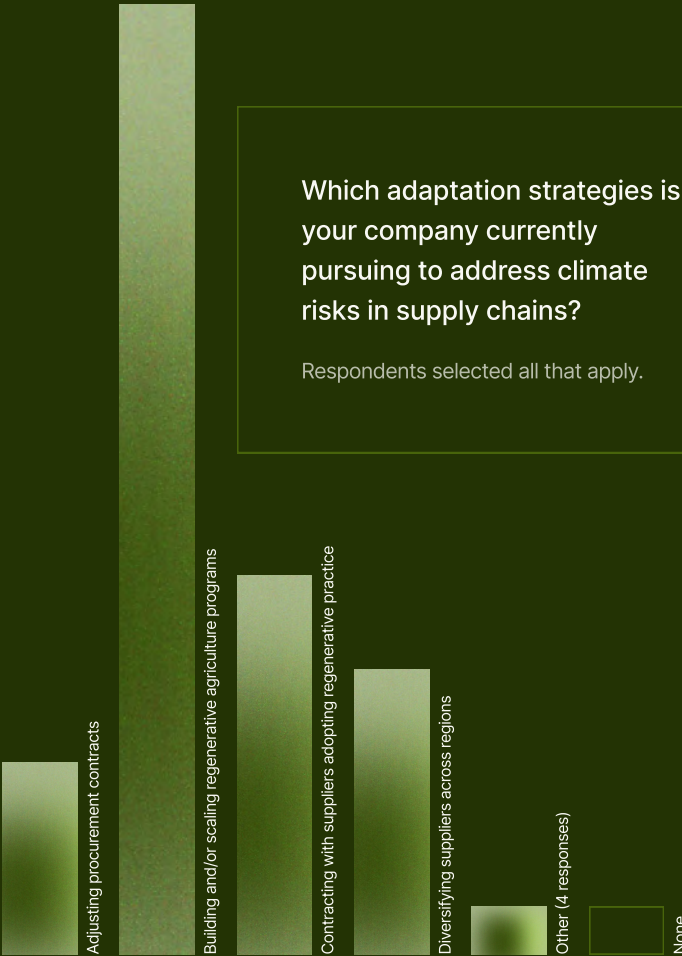
Once risks are understood, how are companies acting on them?

Leading organizations are deploying a portfolio of actions designed for different time horizons, balancing near-term risk management with longer-term efforts to reduce underlying exposure across their supply chains.

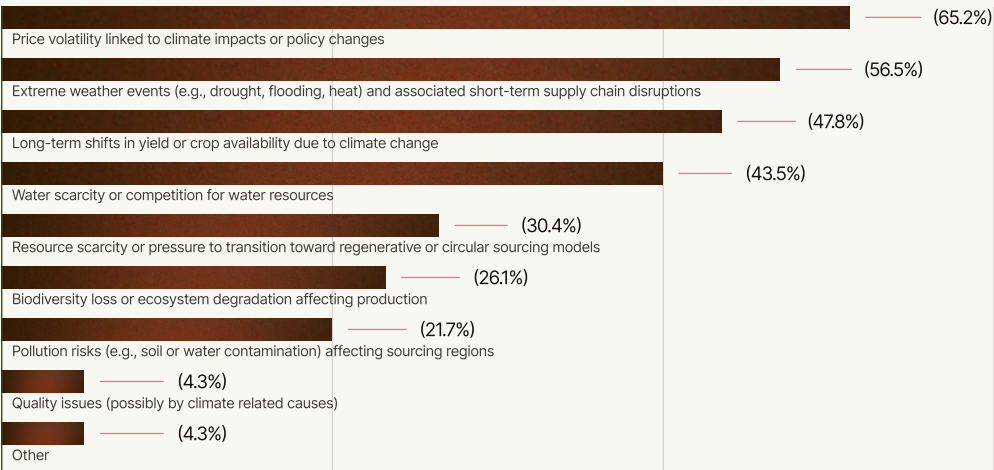
In the near term, some companies are adjusting sourcing regions, suppliers, or procurement strategies to manage immediate risks such as extreme weather disruptions or sudden price volatility. These actions can help stabilize supply in the face of acute shocks, but they are often reactive by nature and limited in their ability to address the root causes of climate exposure.

Longer-term resilience is where regenerative agriculture is playing a more central role. 85% of respondents report building or scaling regenerative agriculture programs as a primary response to climate risk, making it the most common strategy identified. These programs are being used as structural investments designed to improve soil health, stabilize yields, and enhance farm-level resilience despite increased climate variability.

This distinction matters because companies are confronting multiple layers of risk at once. A majority of respondents identified immediate climate impacts, including extreme weather events (60%) and pricing volatility (65%), among the top risks influencing decision-making. At the same time, more than half also ranked longer-term shifts in crop viability and water availability as a top concern. Managing today's disruptions while building resilience for tomorrow requires strategies that operate across different time scales.



What types of climate risks most influence your sourcing decisions?



Respondents selected up to 3

Tate & Lyle’s regenerative agriculture program stands as just one example of how a company can achieve this balance. A global ingredients solutions company with thousands of employees worldwide and customers in more than 70 countries, Tate & Lyle has expanded its regenerative program into France explicitly to address climate risks such as flooding, drought, and extreme temperatures. As Chief Executive Nick Hampton has emphasized, regenerative agriculture plays a dual role: supporting farmers in becoming more resilient to climate-related events while strengthening the company’s ability to reliably serve customers in an increasingly volatile climate.

Companies like Tate & Lyle are becoming more clear-eyed about climate risk and its business implications, responding through a combination of immediate mitigation measures and longer-term transformation efforts. Those that successfully connect climate risk assessment to regenerative action are better positioned to reduce volatility in the short term while building more resilient, reliable supply chains for the future.

“Regenerative agriculture is at the heart of our approach to sustainability, because helping farmers to become more resilient to the impacts of increasing climate change related events also enables our customers to feed a growing population. [...] We’ve demonstrated that these [programs] can materially improve yield and crop quality for farmers and the businesses they supply.”



Nick Hampton
Chief Executive, Tate & Lyle

How to act on these insights

If you’re new to regen ag: start tracking short-term pressures and long-term climate threats. How do procurement teams respond to short-term supply disruptions and climate events? Where do you see opportunities for long-term mitigation across supply regions? Keeping an eye on these details will help you make strategic decisions as your organization matures.

If you’re looking to lead: establish short- and long-term strategies for high-risk crops and regions. Allocate investments to both, and consider short-term strategies (sourcing adjustments) and long-term efforts (regenerative programs) to be two distinct initiatives. Calculate the ROI of these efforts independently and use that to guide future investment.

Theme 2

The question isn't
what data to collect.
It's how.

Organizations are investing in data and tooling to understand emissions and regenerative practice adoption. However, there remains a gap in their ability to access and use data across the supply chain.

“We have data about supply shed emissions and regen ag practice adoption,” said one survey respondent, “but increasing data transparency with our supply chain partners has become an issue. It’s tough to get all our supply chain partners on the same page, with the same data access.”

Supply chain data remains a black box

When asked to rank current reporting priorities, respondents showed strong alignment around the types of data that matters most. The highest priorities were:

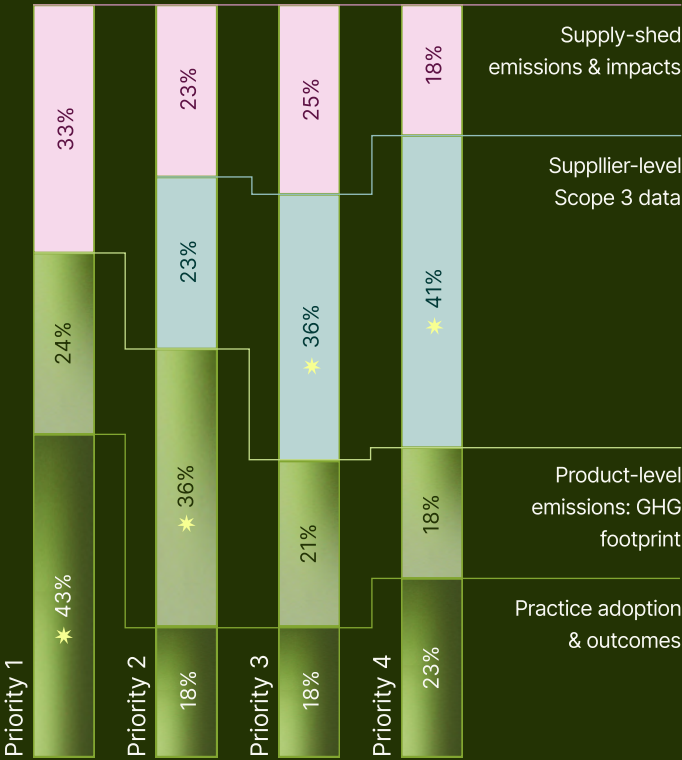
- Practice adoption and program outcomes
- Supply-shed-level emissions and climate data
- Product-level greenhouse gas (GHG) footprints

Together, these priorities signal a growing focus on data that connects on-farm action to emissions outcomes, climate risk, and business relevance. By contrast, relatively few respondents identified supplier-level Scope 3 data as a top priority.

Supplier-level data isn’t unimportant, but it’s difficult to prioritize. Supplier-level transparency is recognized as necessary, but barriers like fragmented data systems, limited incentives, trust gaps, and uneven engagement across suppliers continue to slow progress.

We hypothesize this is why we’re seeing alternative priorities in the survey: there’s a growing reliance on aggregated, supply-shed-level insights and outcomes data as a more feasible starting point for action. Our industry knows what it needs to measure but is still working through how to access, trust, and scale that data across complex supply chains.

How surveyed companies placed their priorities



How to act on these insights

If you’re new to regenerative ag programs: focus on outcomes, adoption and supply shed emissions reporting

If you’re looking to lead: invest in building data transparency across the supply chain

If you’re a supplier: making emissions data available can lead to stronger partnerships



Commitment hasn't closed the readiness gap

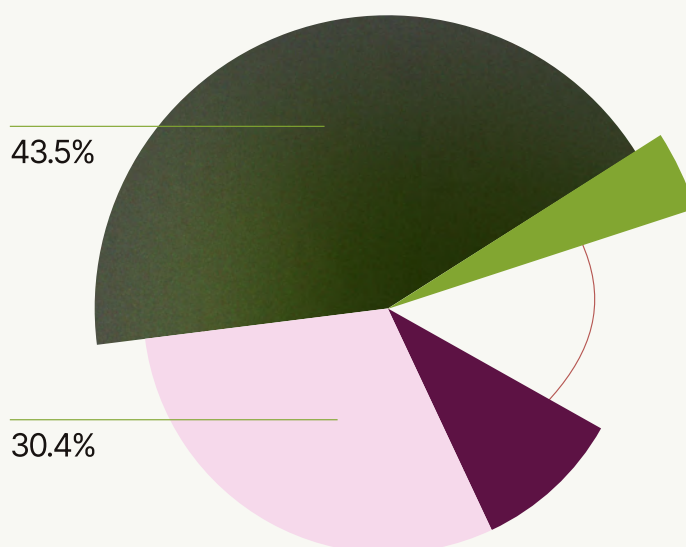
Data infrastructure readiness is another important factor to consider in how we use data.

Only one respondent indicated that their company is fully prepared to meet current regulatory reporting requirements while also having systems in place to scale for future needs. Most companies instead describe themselves as being somewhere in between: able to meet today's expectations, but uncertain about their ability to adapt as requirements evolve.

Important term:

data infrastructure

Data infrastructure is the ability to collect, access, and analyze data on emissions, regenerative practice adoption and program outcomes. Data infrastructure includes collecting and displaying data in compliance with regulations and/or making that data accessible across the supply chain.



Which of the following best describes your company's current data infrastructure readiness for regulatory reporting?

- ☒ We are actively investing in systems to scale as requirements evolve
- ☒ We can meet current requirements but are not yet equipped for future changes
- ☐ We are not yet prepared to meet current regulatory requirements
- ☐ Our data infrastructure is fully equipped to meet current requirements and scale
- ☐ We do not anticipate that regulatory reporting will impact us in the near term

At the same time, nearly half of respondents report actively investing in data infrastructure and systems to support reporting. This combination of low confidence and high investment shows that we are at a critical transition. Companies are committing resources despite uncertainty, acknowledging that accessing emissions and outcomes data is necessary despite uncertainty in standards, assurance expectations, and disclosure rules.

Survey findings suggest that fragmentation in data and reporting is not driven by a lack of ambition or awareness. We just need to find the best way to unlock data across the supply chain, and make that data accessible for all stakeholders in a regenerative ag program, supply shed or product value chain.

Using data to drive investment

The implications of this readiness gap extend well beyond reporting. Companies that can reliably collect, interpret, and apply data across their supply chains are better positioned to:

Identify climate risk hotspots within sourcing regions	Direct capital toward practices that strengthen resilience and supply reliability
Prioritize interventions where they will have the greatest impact	Demonstrate credible progress against climate and resilience goals as expectations evolve

In this context, data infrastructure is a foundational capability for decision-making in a more volatile agricultural system.

How to act on these insights

01 If you're new to regen ag programs: don't let policy uncertainty slow you down. Invest in tools to track emissions and program outcomes, and use that data to drive business strategy

02 If you're looking to lead: discuss investing in shared data tools and establish clear processes with supply chain partners. Use data to calculate program ROI and secure investment. Look at the story the data is telling you: what regions, practices or crops need more investment?





Case study

Romania's 8 highest yielding corn regions

When reporting drives innovation and resilience

For leading companies, data and reporting systems are becoming a catalyst for smarter sourcing and risk mitigation. When designed well, reporting can surface climate risk earlier, reveal actionable intervention points, and guide more strategic investment in resilience. However, when not designed carefully, it can create friction and delay decisions.

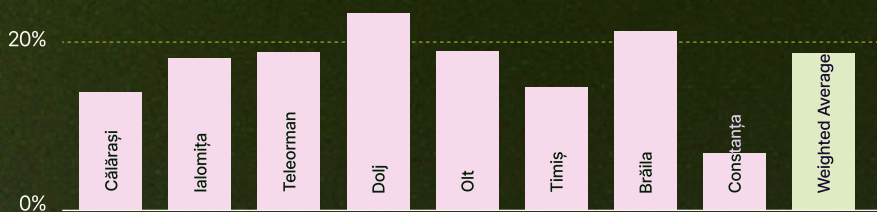
Today, many organizations face a familiar challenge. A procurement or sustainability leader requests climate risk and emissions data for a priority sourcing region. Teams launch supplier surveys and receive partial, inconsistent responses. Perhaps fewer than half of suppliers respond, none have complete datasets, and critical climate exposure data lives in a separate system altogether. As a result, teams spend months assembling fragmented inputs, and the outputs are difficult to act on.

A recent example from Europe illustrates how integrated data systems can change this dynamic. After assessing the EU's Corporate Sustainability Reporting Directive (CSRD), Regrow analyzed more than one million hectares of corn in Romania, one of the EU's largest corn-producing regions and a critical sourcing area for global food companies. In 2023, intense heatwaves drove yield losses of approximately 20% for corn and 35% for sunflower, underscoring climate change as a direct threat to supply reliability.

CSRD requires companies not only to disclose climate risks, but to document mitigation strategies tied to those risks. Using CSRD-aligned climate and emissions data, Regrow overlaid heat stress exposure, agricultural GHG emissions, and on-farm practice adoption across Romania's corn belt. This analysis revealed both the scale of the challenge — over 80 days of extreme heat stress in key producing regions — and a clear opportunity for action.

While climate risk in the region is rising, less than 20% of corn hectares are currently cover cropped, leaving soils exposed during periods of extreme heat and drought. Practices such as cover cropping and reduced tillage are known to improve soil moisture retention and temperature regulation, directly increasing crop resilience during heat stress events. In this context, reporting data helped identify where regenerative practices could materially reduce exposure to future shocks.

Cover Crop Adoption Rate (2024)



This kind of insight transforms reporting from a compliance exercise into a decision-making tool. By using the same data required for CSRD reporting to inform procurement and supplier engagement strategies, companies can pinpoint climate risk hotspots within their supply sheds, identify regenerative practices that directly mitigate those risks and target investments where they will have the greatest impact.

Data systems that are designed only for compliance will struggle to keep pace. Those designed to support both reporting and decision-making can become a powerful engine for innovation and long-term resilience.



Fit-for-purpose data

Looking ahead, companies have an opportunity to rethink how they apply data for reporting and action. In emissions accounting, Tier 1, Tier 2, and Tier 3 methodologies reflect increasing levels of data specificity and rigor. As defined by IPCC:

Tier 1	Tier 2	Tier 3
Relies on generalized default data and emission factors	Incorporates region- or country-specific parameters	Uses the most detailed system-specific data, often supported by models, high-resolution activity data, or direct measurement

Rather than pursuing the highest tier everywhere, leading organizations are beginning to apply a more nuanced strategy: aligning data rigor with decision-making needs, program maturity, and reporting expectations.

In practice:

- Tier 1 and Tier 2 data can support near-term reporting, baseline development, and portfolio-level screening
- Product-level GHG footprints, often using Tier 2 or Tier 3 approaches, can inform portfolio strategy, customer communication, and credible claims
- Practice adoption and outcomes data, frequently supported by Tier 3 methodologies, enable companies to link on-farm action to emissions reduction, resilience outcomes, and return on investment

By intentionally matching data quality to purpose, companies can deploy resources more efficiently, improve reporting accuracy, and realize higher ROI from regenerative agriculture programs without overbuilding systems.

How to act on these insights

Whether you're new to regen ag or looking to lead, build a data process that fits the needs of your program. Prioritize the best available data for a crop or region. Work to increase data transparency between partners, or preparing data systems to track programs as you scale to new regions or crops.

	Tier 1	Tier 2	Tier 3
Input data spatial resolution	Global	Regional / country-level	Site specific
Activity data	Minimal, e.g. total area of different land use types	Moderate: management practices	Extensive: Event-based
Quantification	Static equations with coefficients and factors	Same as Tier 1	Calibrated and validated modeled data
Output	Coarse estimate- low spatial and temporal resolution	Regional GHG estimates, static year-over-year, limited variation	Most granular and accurate, reflect site-specific differences + year-over-year impacts
Outcomes available	Global estimates on impact of select practices	Reductions estimates for most practices	Reductions and removals for domains with sufficient research

Certainty →

Shifting as guidance evolves

Guidance such as LSRS and SBTi will continue to evolve as expectations around land-sector emissions, removals, and assurance become more defined. For many companies, this will require periodic recalibration of reporting approaches.

For those with adaptable data infrastructure, however, these shifts represent more than a compliance challenge. They create an opportunity to adjust data systems and reveal where resilience investments deliver the greatest returns, where sourcing strategies can be strengthened, and where climate action aligns most directly with business performance. Over time, the ability to adapt quickly to changing guidance may become a defining source of competitive advantage.



Theme 3

The case for
landscape action is
settled. The operating
model isn't.

The case for landscape action is settled. The operating model isn't.

Interest in landscape-level action is clearly growing. In 2025, landscape-level collaboration emerged as a clear focal point for scaling regenerative agriculture. However, industry leaders are still learning how to make it work.

We see the value in collaborating with partners across similar sourcing regions," said one survey respondent, "It lowers our costs while building resilience for multiple crops in the same region. But it's still hard for us to calculate the ROI for each partner, and co-claiming outcomes is a recurring issue.

We saw momentum for landscape level partnerships at many points in 2025. At the COP28 Action Agenda on Regenerative Landscapes, global stakeholders aligned around the need to advance regenerative agriculture at landscape scale. As of November 2025, the initiative reported coverage of more than 210 million hectares and the mobilization of over \$9 billion in regenerative landscape investments. This signals that landscape collaboration is actively aggregating commitments at scale.

Within our network, survey respondents consistently pointed to the value of pre-competitive collaboration and shared investment models as climate risk, disclosure pressure, and supply instability intensify. Respondents see landscape approaches as a way to lower program costs, share risk, and build more durable resilience in regions critical to long-term sourcing.

Is your company currently participating in any landscape-level regenerative agriculture or resilience programs (programs in which two or more companies, who source from the same landscape, are co-investors)?

30.4%

Not yet, but we're interested in learning more

43.5%

Yes

4.8%

Unsure

21.7%

No

Important term:

landscape level partnerships

A landscape level program is one in which several stakeholders who source from the same region co-invest to increase resilience within that region. This is different from a supply chain program, in which partners across the same supply chain co-invest in a program. Landscape level partnerships can be pre-competitive collaborations across multiple companies; even those that source different crops from the same farmers.

Top motivations for engaging in landscape-level programs include:

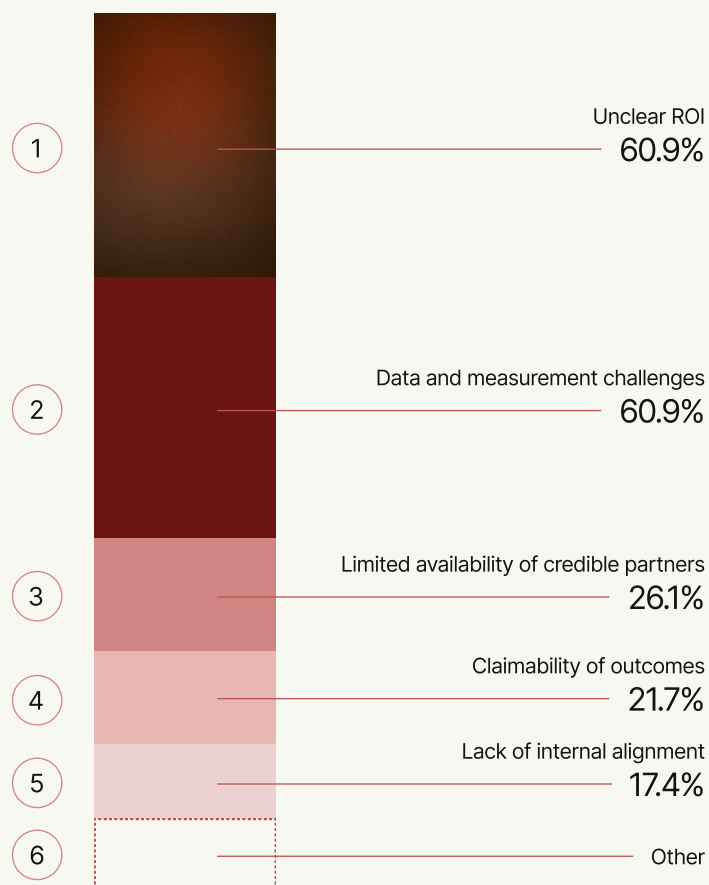
- 1  Building resilience in priority sourcing regions
- 2  Reducing costs through shared investment
- 3  Scaling regenerative practice adoption in a specific region
- 4  Increasing claimable Scope 3 reductions

However, progress in landscape level partnerships remains slow.

Survey respondents identified several persistent barriers to implementing these programs, including unclear ROI, measurement challenges, and limited partnership opportunities.

One notable finding helps explain this gap: respondents overwhelmingly reported that they are designing and operating their own regenerative programs, often with direct supply chain partners. While this approach can offer control and efficiency, it can also limit scale and increase cost, especially when similar programs are being built in parallel within the same regions and among the same growers.

What are the main barriers preventing the establishment of landscape-level partnerships for your company?



This dynamic points to an important opportunity: broadening access to existing programs, or making proven program models easier to join, could unlock scale and improve ROI. Shared approaches have the potential to reduce duplication, streamline data collection, and offer growers more long-standing programs and better incentives.

50%



We are designing a program with supply chain partners to best meet our needs

27.3%



We are designing a program ourselves (or with a program development partner) and sourcing partners from our supply chain

22.7%



We have opted to co-invest in existing programs and reach scale more cost-effectively

In 2025, Regrow hosted a series of workshops focused on facilitating and accelerating partnerships across the supply chain. Survey responses and workshop discussions showed us that landscape-level action is less constrained by willingness to engage in pre-competitive partnerships, and more by internal alignment.

Procurement was a frequently cited gatekeeper. Companies in our network noted that competing sourcing priorities, the need to commit volumes to specific landscapes, and legal constraints around data sharing can slow or block participation. In several cases, procurement teams ran into issues balancing short-term flexibility against the longer-term commitments that landscape programs require.

Finance was also cited as influential, particularly where landscape investment represents a departure from business-as-usual practices. We've come across customers with significant challenges in making the financial case to investors and internal decision-makers when returns are longer-term or shared across multiple actors.

Together, these responses reinforce a central finding of the survey: while interest in landscape level action is growing, progress depends on aligning procurement, finance, and sustainability around shared goals, timelines, and definitions of value.





What strong partnerships have in common

Insights from a workshop we held in 2025 with leaders across grain supply chains suggest that successful regenerative agriculture partnerships share a few defining characteristics.

First, effective programs are clear about which collaboration model fits their goals:

Landscape-level partnerships	Supply-chain partnerships
These work best where multiple buyers operate in the same region or across crop rotations, and where environmental risks extend beyond a single supply chain. These models enable pooled investment, coordinated farmer engagement, and shared environmental outcomes, but require careful attention to governance, data sharing, and role clarity.	These tend to move more quickly and are well-suited for situations where traceability is established or can be built. With fewer partners, these programs often allow for tighter alignment on reporting needs, incentives, and MRV systems. However, they may have less influence in years when a specific crop is not in production.

Our survey indicates that landscape-level partnerships are gaining traction in the industry, but that doesn't negate the importance of determining which partnership model is best for your organization.

Second, strong partnerships are built on early alignment. Successful programs invest time upfront to clarify definitions, reporting requirements, cost-sharing arrangements, and success metrics. This alignment is especially important when partners face different regulatory, investor, or customer pressures.

Third, clarity of roles reduces friction. Regenerative agriculture programs rely on a consistent set of functions: program funding, farmer engagement, technical assistance, data collection, MRV, and reporting. Whether these roles are distributed across multiple organizations or consolidated within one, partners are most effective when responsibilities are explicit and well-coordinated.

Ultimately, the survey results suggest that the next phase of progress will depend less on proving the value of collaboration and more on designing partnership models that align incentives, reduce complexity, and make participation easier. Companies that succeed in doing so will be better positioned to scale regenerative agriculture, strengthen regional resilience, and deliver shared value across supply chains.

How to act on these insights

For companies looking to move from interest to implementation, the path forward often starts with a few practical questions:

- Which regions matter most to our sourcing strategy, and why?
- Are there existing programs or partners we could join rather than building from scratch?
- What role is our organization best positioned to play: funder, convener, technical contributor, or data partner?
- What internal concerns need to be addressed early to build durable support?

Answering these questions helps shift landscape-level action from an abstract ambition to an executable strategy.

Theme 4

Carbon removals are moving mainstream

Carbon removals are moving from exploration toward early adoption.

Survey results show that 48% of respondents are exploring how to incorporate removals, while 38% are already doing so, signaling growing momentum alongside careful consideration.

Respondents consistently emphasized that removals are viewed as a complement to emissions reductions, not a replacement. This perspective reflects a broader industry understanding: removals must be integrated into holistic, practice-based strategies to deliver durable climate and resilience outcomes.

48%

of respondents are exploring how to incorporate removals

39%

are already doing so, signaling growing momentum alongside careful consideration

Respondents consistently emphasized that removals are viewed as a complement to emissions reductions, not a replacement. This perspective reflects a broader industry understanding: removals must be integrated into holistic, practice-based strategies to deliver durable climate and resilience outcomes.

Important term:

Carbon removals

Actions that remove carbon dioxide from the atmosphere and store it durably, including through soils and land-based practices



Credibility, monitoring, and permanence remain central

Across responses, monitoring and permanence emerged as the most persistent concerns. Companies highlighted the importance of tracking removals alongside ongoing emissions and acknowledged the practical challenges of ensuring durability over time, particularly in agricultural systems where outcomes are influenced by weather, management decisions, and local context.

These uncertainties are shaping a measured approach. Many organizations are testing methodologies, piloting programs, and seeking solutions that balance scientific rigor with operational feasibility. Rather than rushing to scale, companies are prioritizing approaches that can withstand scrutiny and adapt as standards evolve.

The internal business case for removals

For some companies, removals also play a role in strengthening the internal business case for climate investment. Respondents noted that relying solely on emissions reductions can lead to uneven or low returns in years when outcomes depend heavily on farm yields or external conditions. In this context, removals can help stabilize investment, offset carbon-related costs, and support more consistent long-term engagement with suppliers.

As one respondent shared:

“

Removals are crucial for achieving our climate goals and building a stable internal business case. When we focus only on carbon reductions, we run the risk of lower yield and we still have to account for climate events and unexpected yield loss. During tough years the ROI is low to non-existent.

”

Removals can help companies reach climate goals, even during years when emissions reduction is lower than expected. The dynamic helps explain why removals are gaining traction not as a standalone solution, but as part of a broader portfolio approach to climate action and resilience.





What LSRS signals about the path ahead

Emerging frameworks such as LSRS are reinforcing a key theme that surfaced throughout the survey: credible removals will depend on traceability and clear linkage to real-world activity. Now that guidance is here, we have clarity around how removals are documented, attributed, and connected to specific supply sheds.

LSRS is pushing companies to move beyond abstract accounting and toward clear connections between field practices, emissions outcomes, and supply chain pathways, particularly in agriculture. This has important implications for removals reporting. Companies will need to demonstrate not only that removals occurred, but where they occurred, under what conditions, and how they relate to the company's value chain.

Building readiness now

Companies do not need to wait for reporting deadlines to begin preparing. Those best positioned to integrate removals responsibly are already building the underlying process discipline needed for future reporting, including:

Defining and mapping clear supply-shed boundaries	Aligning procurement and sustainability teams on supply chain pathways and data ownership
Documenting transparent assumptions to support audit readiness	Establishing repeatable approaches to linking field-level practices to quantified outcomes

These steps support removals reporting, but they also strengthen broader data and governance foundations.

Not a settled strategy

These perspectives explain why carbon removals are best understood as an emerging frontier rather than a settled strategy. Companies are moving beyond whether removals have a role and toward how they can be responsibly integrated in ways that support climate goals, farm resilience, and durable impact.

As organizations continue to explore removals as a viable complement to emissions reductions, advancing monitoring capabilities, permanence approaches, and traceability infrastructure will be essential. Reducing friction in these areas will not only help scale removals, but also ensure they contribute meaningfully to credible, resilient climate strategies as reporting expectations continue to evolve.

Moving from insight to action

The 2026 State of Agriculture Resilience shows an industry that is clear-eyed about what resilience requires and where execution still falls short.

What separates leaders from the rest is not ambition, but follow-through.

Progress depends on connecting climate risk assessment to investment decisions, building data systems that can adapt as expectations change, and designing partnerships that make participation easier rather than more complex. It also requires approaching emerging guidance, such as LSRS, as a tool for strengthening supply chains.

Resilience is built through deliberate choices: where to focus, which partners to engage, what data is truly decision-relevant, and how value is defined across sustainability, procurement, and finance. Companies that make these choices with clarity and coordination will be better positioned to reduce volatility, support farmers, and secure reliable supply.

This report offers a snapshot of where the industry stands today and a signal of what comes next. The organizations that act on these insights in 2026 will help define the next phase of agriculture resilience.



Ready to start building resilience in your supply chain?

Regrow helps companies across the value chain get from baseline to pilot program to implementing regenerative ag at scale. [Talk with a Regrow expert](#) to learn how you can build your business case for resilience today.

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