

Agribusiness and Chemicals Services and Solutions 2025

A report comparing provider strengths and differentiators to help enterprises in sourcing decisions



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Introduction

The agribusiness sector is linked to the chemicals industry owing to its use of fertilizers, pesticides and other agrochemicals that enhance crop yield and protect plants. Chemicals improve soil conditions, regulate plant growth and support animal health.

Agribusiness

Agribusiness represents approximately 30 percent of Brazil's GDP. Despite all this progress, the sector has shortcomings in the management and continuity of technological applications, especially in businesses with family origins and/or suppliers that are not fully structured or integrated into the agribusiness value chain.

Chemicals

The past year was challenging for U.S. chemical producers, as an unprecedented destocking cycle led to a 1.3 percent decline in production in 2023. However, with inventories now more balanced and early signs of rising demand, chemical output is projected to grow by 2.2 percent in 2024, with gains across all segments.

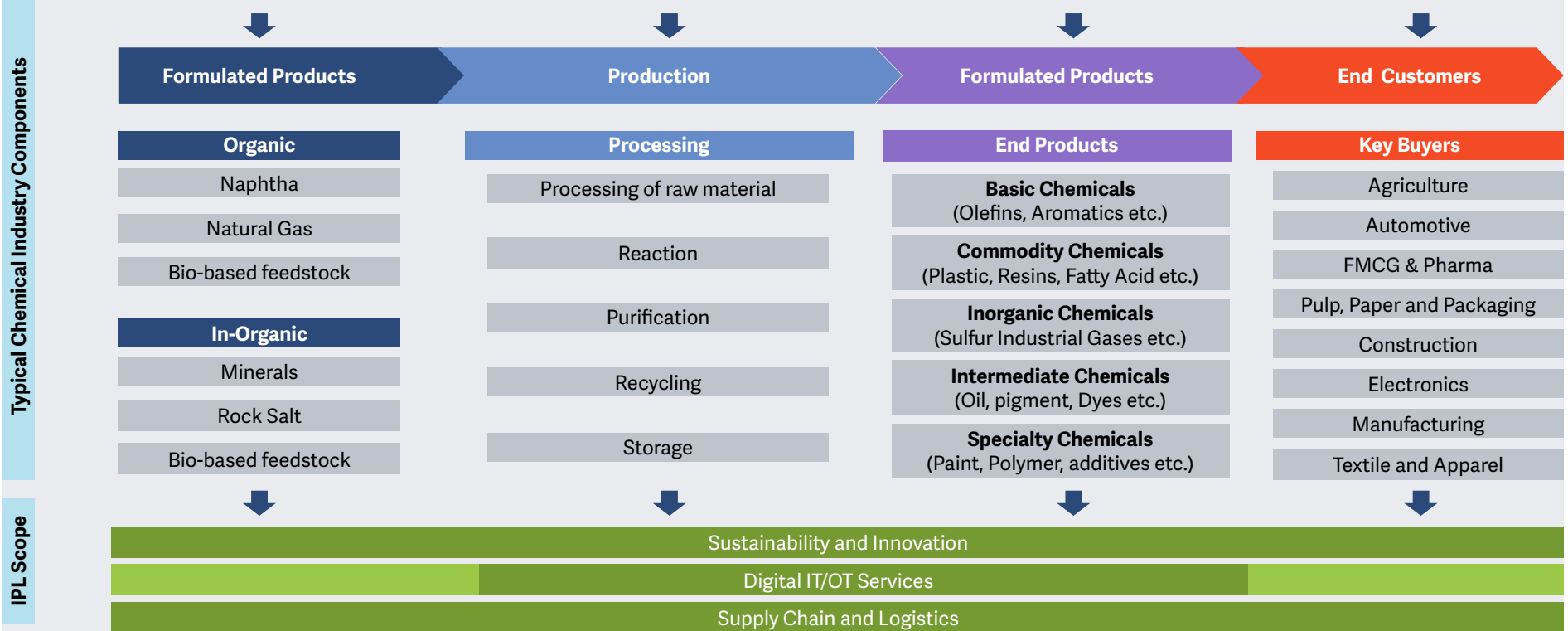
Growth is expected to continue at 1.9 percent in 2025, with the Gulf Coast and Midwest regions seeing the largest increases in production.

The ISG Provider Lens™ Agribusiness and Chemicals 2025 study focuses on consulting, implementation and integration aimed at strategy and enablers, supply chain and logistics, sustainability and innovation, and digital IT/OT.

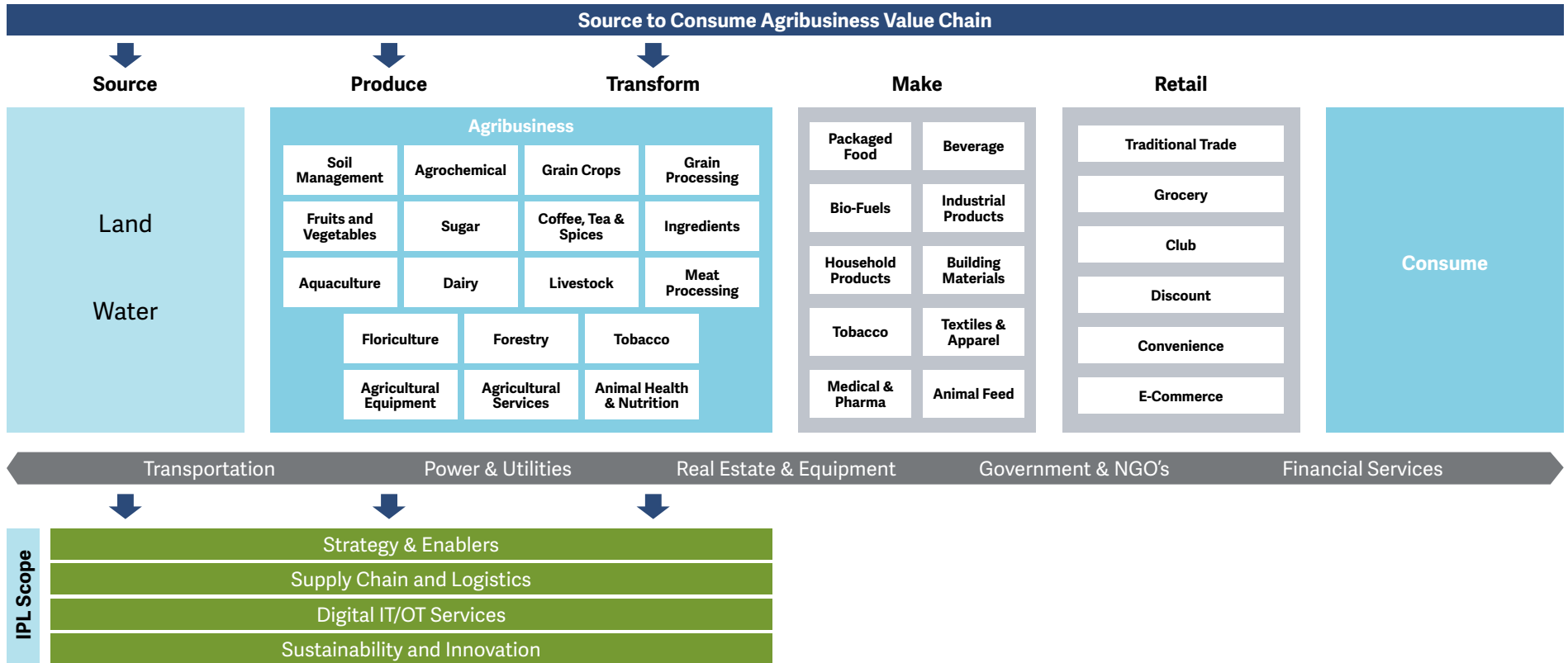
Providers are expected to leverage technologies such as ERP, IoT, communication networks, AI, generative AI (GenAI), blockchain, analytics and automation while prioritizing cybersecurity and data orchestration, enabling the optimization of the agribusiness and chemicals value chain.



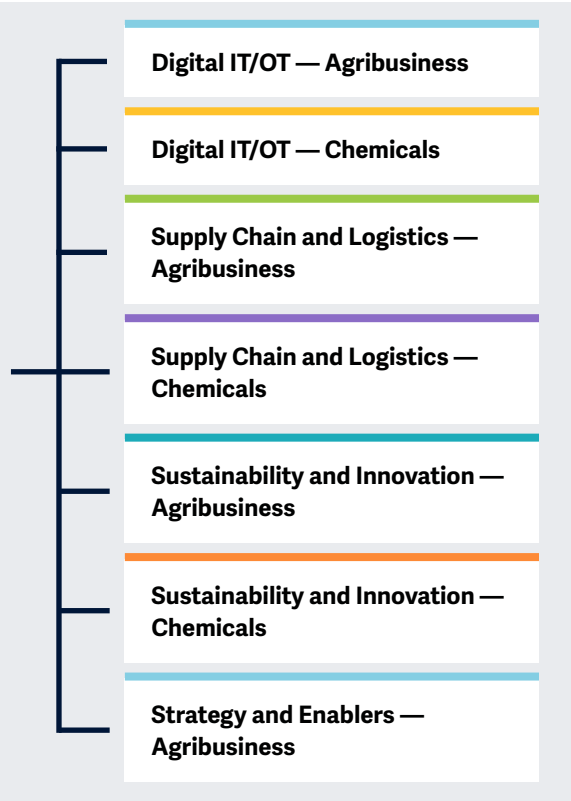
Chemical Industry Value Chain



Source to Consume Agribusiness Value Chain



The key focus areas of the **Agribusiness and Chemicals 2025** report.



Simplified Illustration Source: ISG 2024

The ISG Provider Lens™ Agribusiness and Chemicals 2025 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on different markets, including the U.S. and Brazil

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.



Definition

Agriculture has grown by more than 12 percent per year over the last two decades in markets such as Brazil. The constant need for information and digital transformation in agribusiness, along with the integration of IT/OT technologies in agriculture, contributes to the evolution of more structured digital data. However, the need for new sensors, field equipment, multifrequency networks and platforms has been decisive in enabling digital precision in the field for decision-making and management.

Operating in large and isolated regions presents unique challenges in agribusiness. The technologies used in other industries cannot always be easily implemented in agribusiness, requiring more specialized solutions and suppliers.

To gain credibility in this field, it is crucial to offer integration services and assurances of continuous supply for years along with technology. These technologies can provide operational credibility to agribusiness.

Eligibility Criteria

1. Multifrequency or satellite field **communication networks** and sensing
2. Structured **data platform, technologies and systems** that can receive and consolidate data on weather forecasting, rain, pests, soil quality, humidity and fire management
3. **Cloud data management and analytics**
4. **Remote sensing and satellite imagery** (land or crop analysis)
5. **Crop monitoring and disease prevention**
6. **AI monitoring, cockpits** and decision-making
7. **Tractors and fertilizer spreaders guided by geolocation and telemetry**
8. **Mobile systems** for complementary pointing in the field
9. **Connectivity or integration with external systems** such as **weighing scales and ERPs** for monitoring
10. **Cybersecurity** (IT and OT security)
11. Operation and support **assurance with SLA**, preventive and predictive **maintenance**
12. **Solid partnerships** with associations, **regulatory** bodies, technology companies and startups specializing in the sector



Definition

About half of the chemicals industry adopted digital transformation by the end of 2022, and more than 60 percent of companies reported positive returns. Investing in digital transformation is crucial for the chemicals industry to minimize manufacturing inefficiencies. Besides improving operational efficiency, such transformation helps companies achieve various goals, including enhancing workplace safety, meeting sustainability targets and addressing labor shortages.

This quadrant assesses service providers offering technology and operations management services to chemicals industry clients. These services are driven by automation, digital transformation, AI, cloud, data management, asset optimization, asset management analytics, IT/OT integration, ERP services and solutions and infrastructure services (data center, cloud, network, workplace and cybersecurity). They enable chemical companies to improve efficiency and productivity in daily operations while enhancing decision-making.

Eligibility Criteria

1. Ability to **offer a combination (if not all) of the following operational IT and business services** to companies across the chemicals industry value chain, with local expertise in the assessed region or country:
 - Digital transformation advisory and consulting services
 - Applications development and maintenance
 - Infrastructure services, such as data centers, network operations centers, cloud and cybersecurity solutions
 - ERP-related services
 - IT/OT services
2. **Extensive domain or industry knowledge** and support for compliance with local or regional regulatory requirements
3. **Latest technologies**, including automation, analytics, IoT, AI, GenAI, cybersecurity, cloud, AR, VR, mixed reality (MR), extended or immersive reality, additive manufacturing and blockchain
4. **Strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in the chemicals industry
5. **Referenceable case studies from the chemicals and agrichemicals industries** for various services and solutions across the value chain



Definition

In the last decade, agribusiness has been adopting good practices from other industries, accelerating its performance and increasingly integrating controls.

This quadrant evaluates providers that offer services and solutions in the agribusiness value chain, focusing on processes, technologies and implementation services for value chain management. These providers must address complex agribusiness issues, identify growth opportunities and strengthen operations by building future-ready value chains that are resilient, agile and sustainable.

Providers must offer new methods, tools and deep expertise in supply chain and logistics focused on agribusiness. Functional knowledge should cover topics from planning and planting in the field to delivery to end customers.

They must establish optimized, visible and sustainable value chains from end to end and support the technological integrations inherent to digital transformation in the field.

Eligibility Criteria

1. Offer a **wide range of agribusiness chain, implementation and operational** services in the agribusiness chain, covering end-to-end supply chain and logistics operations
2. Highlight the **number and capacity of professionals, projects and clients** for the services described in the **agribusiness value chain**
3. Highlight the use of **methodologies, reference models and use of market-based** or proprietary tools and their best practices
4. Showcase experience in **data orchestration** for connected supply chains and logistics
5. Offer a variety of **application management services**, functionality updates and custom requirements
6. Demonstrate **use cases** delivered **in the regions** covered in the study
7. Highlight use cases in **EPS, advanced planning and scheduling (APS)**, **blockchain, IoT, AI, field management and automation, field communication** interaction and **control tower**
8. Show a strong **digital services innovation road map**
9. **Design technical solutions** according to the reference architecture, digital maturity and business objectives of clients and industry challenges



Definition

The chemical supply chain has undergone significant changes in recent years, primarily driven by inadequate risk management and a lack of resilience in global supply chains. Chemical producers have invested significant time and resources in supply chain initiatives; however, there is considerable room for improvement, owing to the industry's legacy infrastructure, growing market and increasing product complexity.

This quadrant focuses on solutions that help companies manage functions such as procurement, warehousing, inventory, fulfillment, transportation and logistics. Supply chain and logistics operations services emphasize helping chemical industry clients achieve resilient, adaptive, connected, data-driven and sustainable supply chains to mitigate global disruptions and instability. Transforming supply chain and logistics operations will transform businesses, reduce operational costs and increase service levels.

Eligibility Criteria

1. **Expertise in providing leading ERP and supply chain management (SCM) packages**
2. **Ability to provide IT and business strategy and consulting services** to help companies reduce supply chain complexities either on their own or through partners
3. **Ability to define the road map and help design, implement and maintain IT systems and manage back office processes**
4. **Offerings and services** in at least one or more of the following areas, but not limited to:
 - Warehouse management
 - Logistics and transportation management systems
 - Purchasing
 - Shipping
 - Traceability
 - Scheduling
 - Order management
 - Control tower
 - Forecasting
 - Demand planning
 - Materials management
 - Third-party risk management
 - Supply chain optimization
 - Supply chain segmentation
 - Supply chain planning and BPO
 - Sustainability solutions in the supply chain
5. Expertise in **applying next-generation technologies**, including automation, analytics, IoT, AI, GenAI, cybersecurity, cloud, AR, VR, MR and blockchain
6. **Strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in the chemicals industry
7. **Referenceable case studies** from the chemicals, agrichemicals and related industries



Definition

This quadrant evaluates providers that offer services and tools, such as consulting, as well as solution implementation and monitoring, to support sustainable agribusiness. Providers must present relevant capabilities and use methodologies and systemic and innovative technologies to improve these operations within the agribusiness sector. They must comprehensively observe the entire agribusiness value chain in an efficient and technology-enabled manner, which is becoming increasingly important to undertake initiatives for sustainable agribusiness.

Providers must assist companies in simplifying and innovating operations, optimizing resource use and reducing environmental impact through tools and management of end-to-end sustainable business processes. The use of sector-specific operational methodologies and technologies is expected, with customized solutions, to improve these efforts in a structured, lasting and, if possible, even traceable manner.

Eligibility Criteria

1. **Demonstrate capacity** (number of **professionals** and their seniority, projects and clients) in structuring initiatives in related projects
2. Outline **initiatives to implement analyses**, automation and dashboards, and **measure fiscal or tax results** in the **country of origin**, quantitative, financial and qualitative
3. Present initiatives in agribusiness in efforts to record and **reduce the consumption of natural resources** by building an approach to reuse or optimize resources
4. Highlight the use of **AI, blockchain, IoT** and innovative solutions in delivering opportunities for advanced circular economy solutions
5. Showcase **governance, transparency and green footprint** mechanisms, including collaboration with suppliers, and financial metrics to record long-term economic viability
6. **Highlight sustainable material management, procurement, production, distribution and logistics**
7. Present gains in **benefits to society** and social well-being, as well as reduced impact on the environment



Definition

One of the biggest challenges for the chemicals industry is reducing its environmental impact. Chemical production processes generate large amounts of waste and consume substantial energy, contributing to carbon emissions. The industry also needs to ensure the safety of workers and local communities. On the innovation front, the industry requires intensive research to create value in this dynamic environment. This approach to innovation requires digital transformation and agility, along with advances in digital and materials science technology, collaboration with ecosystem partners and a focus on transforming business models.

This quadrant focuses on providers that help chemicals industry players from strategy to execution, addressing sustainability and innovation challenges and delivering value that can bring competitive advantage at scale. It focuses on how these providers help develop and manage sustainability strategy and value chain, net-zero transitions, reporting and analytics, worker safety, R&D, lab management and data management.

Eligibility Criteria

1. Ability to **offer a combination (if not all) of the following sustainability and innovations** to companies across the chemicals industry value chain, with local expertise in the assessed region or country:
 - Sustainability strategy and planning
 - Implementation of green chemistry
 - Worker safety and monitoring
 - Connected or digital labs
 - Chemistry as a service
 - Data management and reporting
 - Circular ecosystem
 - Sustainable procurement
2. **Extensive domain knowledge** and support for compliance with local or regional regulatory requirements
3. **Strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in the chemicals industry
4. **Referenceable case studies** from the chemicals, agrichemicals and related industries



Definition

This quadrant evaluates providers that offer services and solutions, such as consulting and process and technology implementation, to support companies' agribusiness strategy and governance.

These services help align companies' vision with business planning to foster integrated decision-making. The visibility into business planning, combined with the need to convey credible results both internally and externally, is essential. These services address complex and strategic issues involving organizations, identify growth opportunities and strengthen operations. Providers should also consider governance, risk, barter, tax and financial support matters. Through these services, providers support the agribusiness value chain to bolster initiatives that promote a one-year visibility horizon or, under certain conditions, extend planning and actions up to five years.

Eligibility Criteria

1. Develop and adapt **agribusiness strategy** and enablers throughout the value chain
2. **Enable integrated business planning (IBP)** in processes and/or in the implementation of IBP technological solutions
3. **Have skills** in structuring **strategic plans, agricultural, industrial, logistics, commercial, barter and financial master plans**
4. Design and implement **corporate governance and risk management** strategies
5. Use reference models, evaluation **frameworks and best practices** as enablers for a focused digital business, thus providing a **connected and sustainable agribusiness value**
6. Design service **transformation** and develop **strategic road maps** in conjunction with regional and local regulations to create business use cases
7. Demonstrate experience in **change management** and structuring in **family businesses and family succession**
8. Showcase experience in digital technologies, **IBP technology, AI, demand planning, field communication** structures and **management systems in agribusiness**
9. Demonstrate **use cases** delivered in the **regions covered in the study**
10. Have a team with the established skills of consultants with **experience in agribusiness and related technologies**

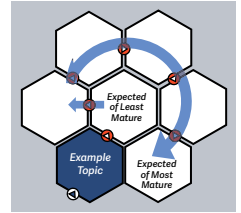


ISG's Chemicals Framework

- Encapsulates what enterprises are doing across the Chemicals Market and helps connect them to the digital solutions
- Represents the entire value chain of supply and demand within the market
- Inner tiles represent themes of enterprise objectives
- Outer tiles represent initiatives
- Behind each outer tile is a specific set of capabilities, with unique market leading providers and solutions

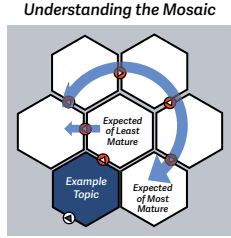


Understanding the Mosaic



ISG's Agribusiness Framework

- Encapsulates what enterprises are doing across the Agribusiness market and helps connect them to the digital solutions
- Represents the entire value chain of supply and demand within the market
- Inner tiles represent themes of enterprise objectives
- Outer tiles represent initiatives
- Behind each outer tile is a specific set of capabilities, with unique market leading providers and solutions



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following seven quadrants on Agribusiness and Chemicals 2025:

Quadrant	U.S.	Brazil
Digital IT/OT — Chemicals	✓	
Digital IT/OT — Agribusiness		✓
Supply Chain and Logistics — Chemicals	✓	
Supply Chain and Logistics — Agribusiness		✓
Sustainability and Innovation — Chemicals	✓	
Sustainability and Innovation — Agribusiness		✓
Strategy and Enablers — Agribusiness		✓



The research phase falls in the period between November 2024 and Feb 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in April 2025.

Milestones

	Beginning	End
Survey Launch	6 November 2024	
Survey Phase	6 November, 2024	3 December, 2024
Sneak Previews	February, 2025	
Press Release & Publication	April, 2025	

Collecting client testimonials via the Star of Excellence™ Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2025 research agenda.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Agribusiness and Chemicals IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the [Buyers Guide research schedule](#).

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:

ISG.star@isg-one.com



ISG Star of Excellence



The ISG Provider Lens 2025 – Agribusiness and Chemicals Services and Solutions research study analyzes the relevant service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of November 2024, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.



Contacts For This Study

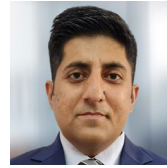
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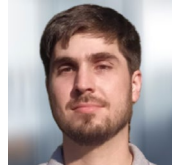
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ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



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**Joyce
Harkness**

**Advisor — Agribusiness
and Chemicals**



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

ABS Group

Accenture

Aegro

Agrobase

Agrofy

Agrosmart

Agrottools

Akkodis

Alvarez & Marsal

Arvato Systems

Asseco

Atos

Bain and Company

BearingPoint

BeGreen

Bioceres

Birlasoft

Capgemini

Ceres

CGI

Coforge

Cognizant

Computacenter

CPQD

Cyient

DataAgro

Deloitte

DXC Technology

Embrapa

Evoke Technologies

EY

Falconi

Fujitsu

Genpact

Geo Agri

Grão Direto

HCLTech

Hexagon Agriculture

Hitachi Digital Services

IBM

iCrop

InCeres

Infosys

Ingenics

Intellias

Internal Technologies

KPMG

Kyndryl

LeverX

LTIMindtree

LTTS

Made in Web

Merino

Mobyweb

Nagarro

Nectar

Netafilm

NTT DATA

Peers Consulting Group

Perficient



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

Persistent Systems

Pix4d

PTxTrimble

PwC

SGS Maine Pointe

SOL by RZK

Solinftec

Stara

Strider/Syngenta

Synoptek

Tarken

TCS

Tech Mahindra

Terra Magna

T-Systems

Unisoma

UNITY

Valley Irrigation - A Valmont Company

Verde Agri

Wipro

XCELIS

YASH Technologies

Zensar Technologies



iSG Provider Lens™

The iSG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of iSG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while iSG advisors use the reports to validate their own market knowledge and make recommendations to iSG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about iSG Provider Lens™ research, please visit this [webpage](#).

iSG Research™

iSG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. iSG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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iSG

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Founded in 2006, and based in Stamford, Conn., iSG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





NOVEMBER, 2024

BROCHURE: AGRIBUSINESS AND CHEMICALS SERVICES AND SOLUTIONS