

STRATEGIC STUDY

COMPETITIVENESS IN THE AGRO-FOOD SECTOR

Demo version, 2025-26, 8TH EDITION - 15.01.2026

STUDY CONTEXT

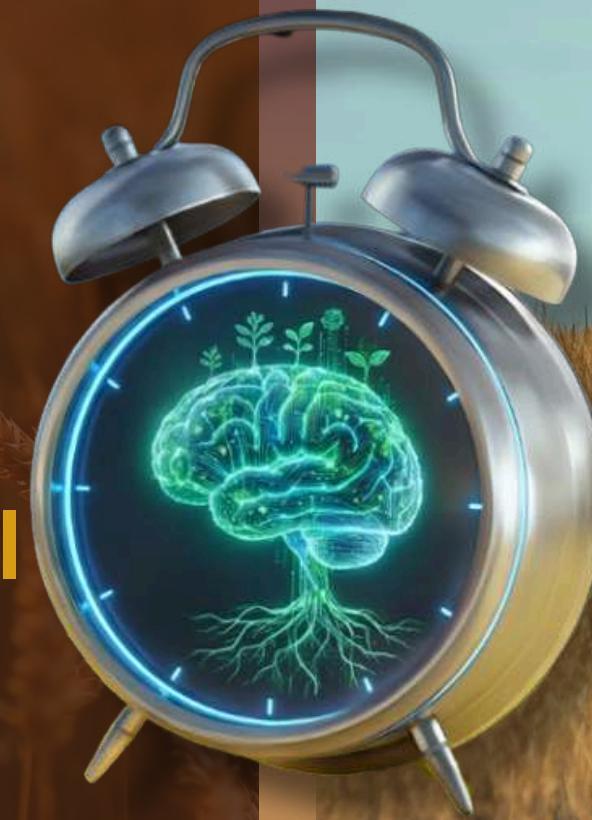
57 responding companies  +28% vs. 2025

- 7 AGXECUTIVE consultants engaged in 2 months of work
- 39% local companies and 61% multinational companies
- Farmers, Suppliers, Distributors, Providers of services, Food processors, Originators and Traders

€59.69 million Average turnover per company (EUR) - ~3.4 billions EUR total turnover

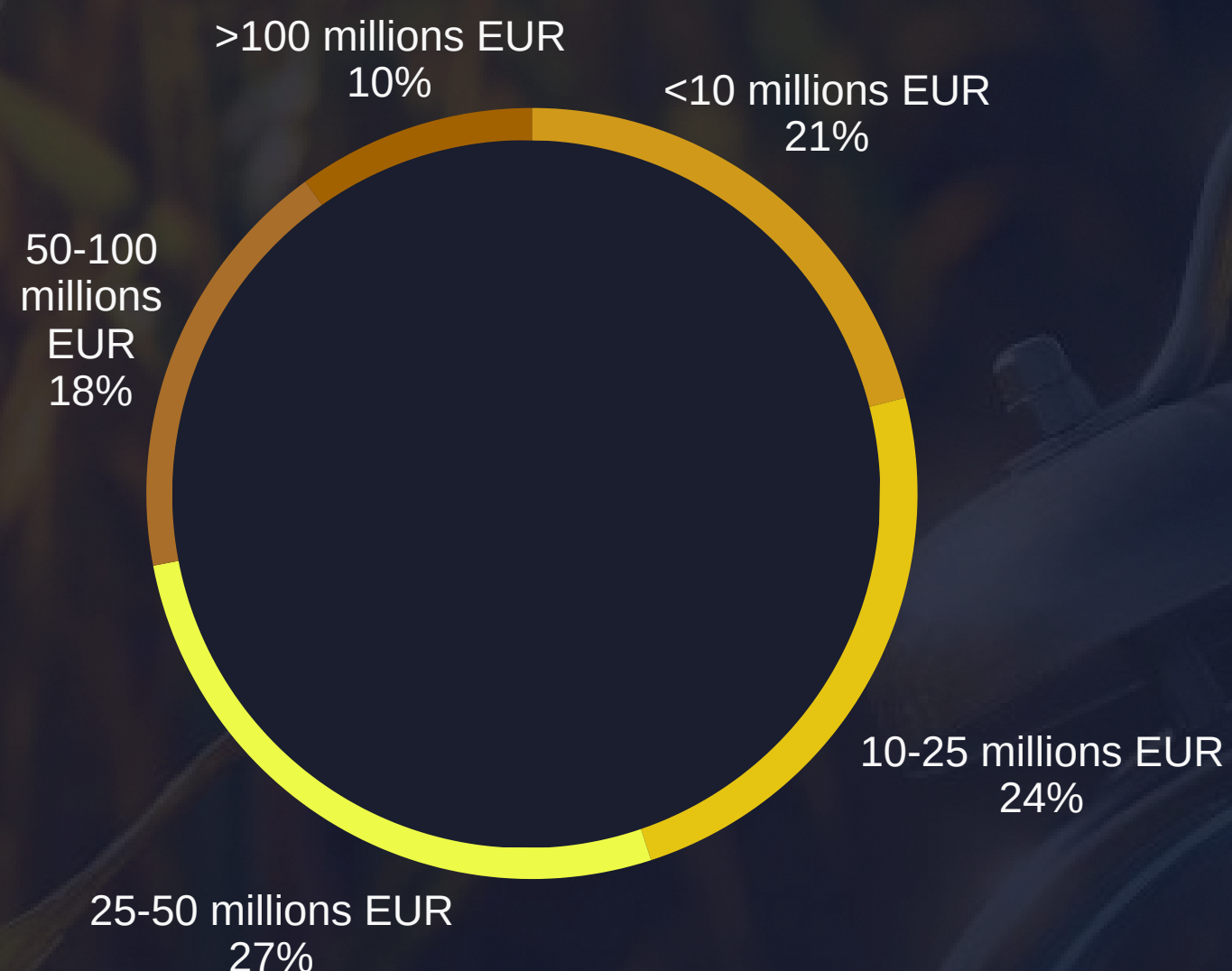
173 Average number of employees per company - 9,863 number of total employees

€344,955 per FTE Productivity (total turnover / total employees)



Sector Coverage

Segmentation by turnover



Segmentation by activity



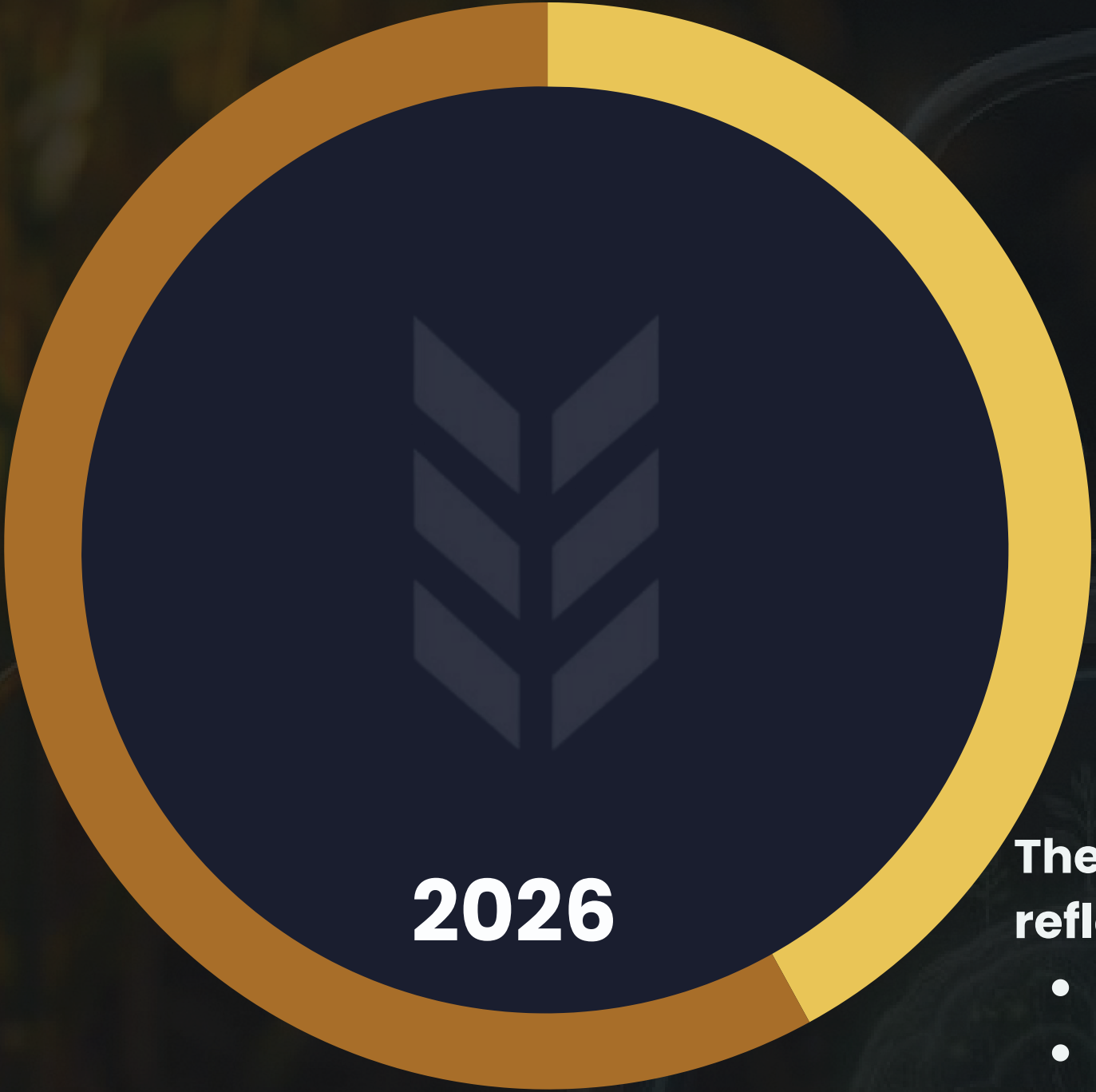
Because the coverage is:

balanced by company size, diversified by activity, and inclusive of both upstream and downstream players, the insights derived from the study can be interpreted as:

- sector-wide signals, not niche observations,
- applicable to both commercial and operational roles,
- relevant for companies at different stages of maturity.

Sector Coverage

Segmentation by type



Multinational
58%

Local
42%

Multinational
56.5%

Local
43.5%

The modest increase in multinational representation in 2026 may reflect:

- higher engagement from larger, more structured organizations,
- increased interest from multinationals in market benchmarking and talent strategy,
- stronger survey participation from companies with established HR functions.
- However, the change is incremental, not disruptive.

Leadership Role Distribution

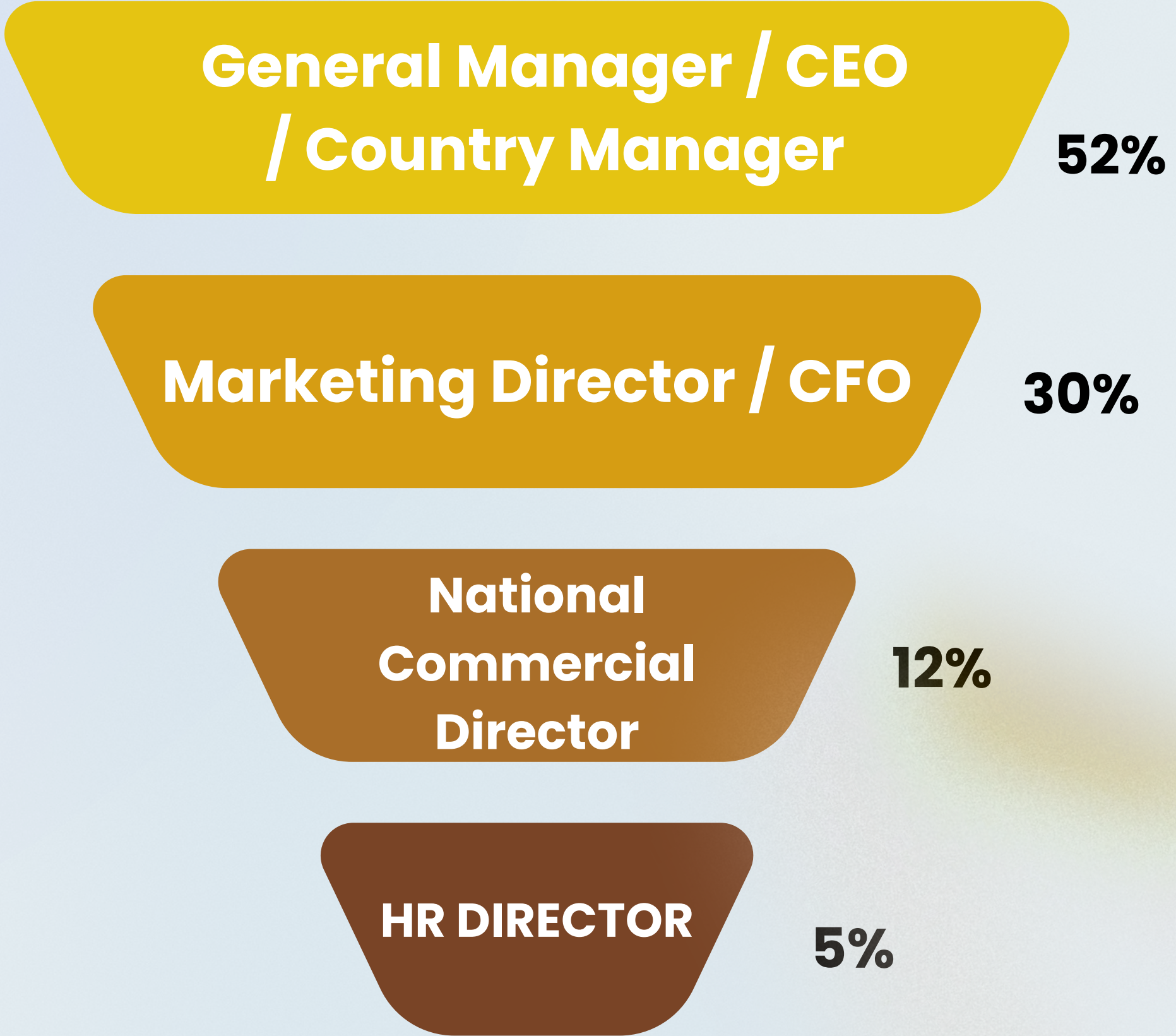
Segment of respondents



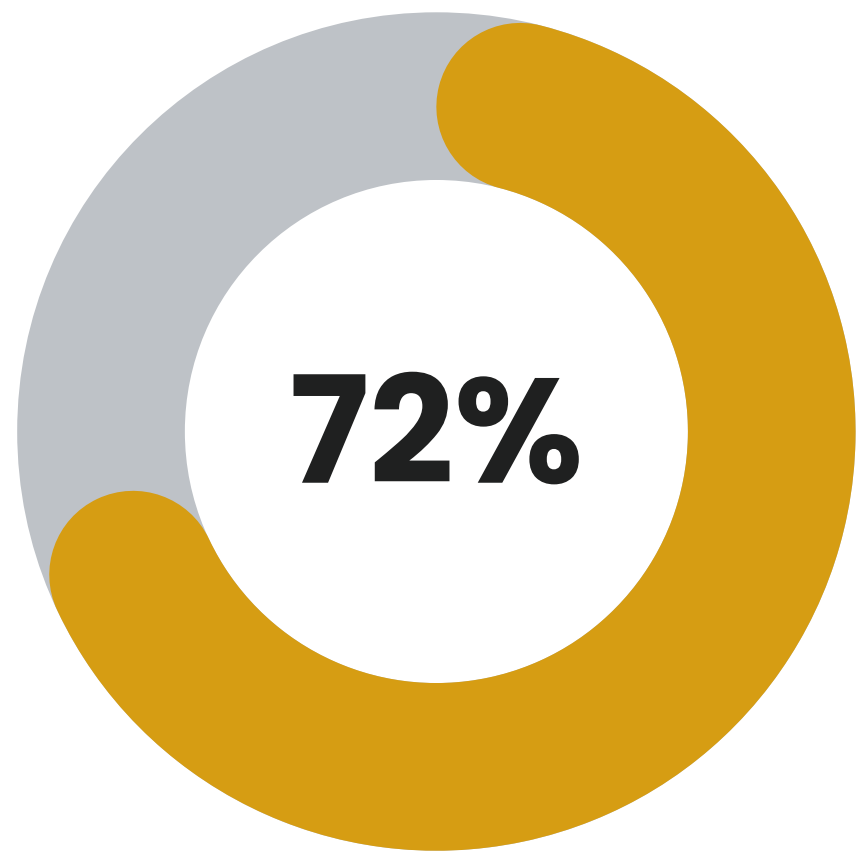
1. **Higher strategic seniority** of respondents versus 2025 study
The share of General Directors / CEOs increased slightly in 2026 versus 2025

2. **Stability in functional leadership representation**

The 2026 edition reflects a more centralized and senior leadership perspective compared to 2025, reinforcing the study's positioning as an **executive-level benchmark** rather than an operational HR survey.



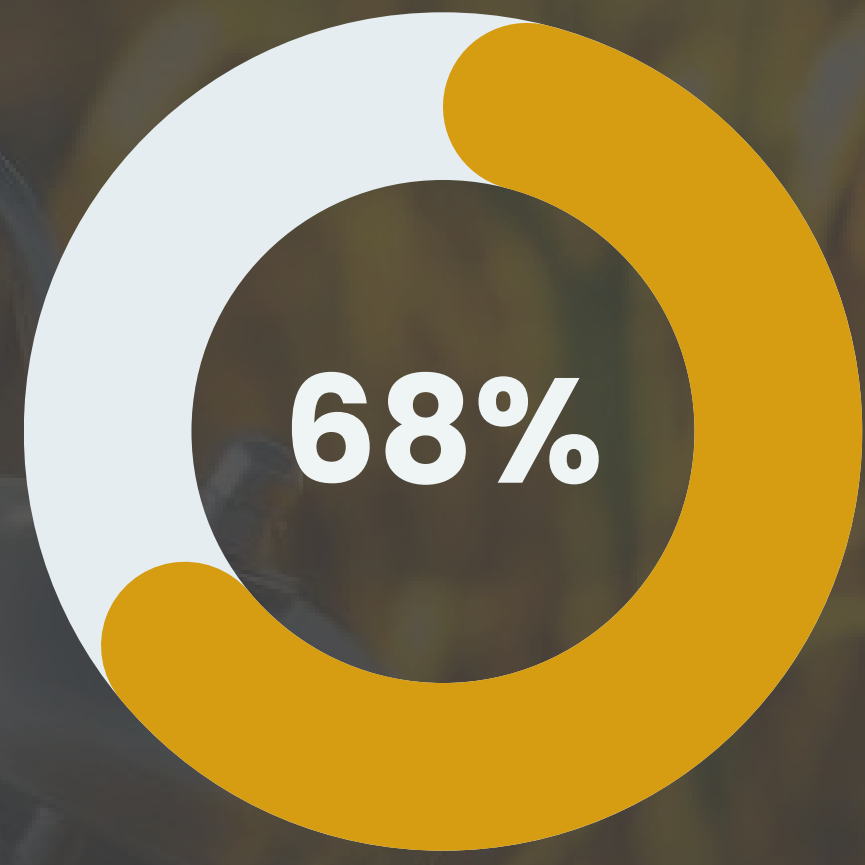
Difficulty of recruitment



~72% in 2026 

Difficulty of recruitment

vs. 68% in 2025



~68% in 2026 

C&B competitiveness vs market

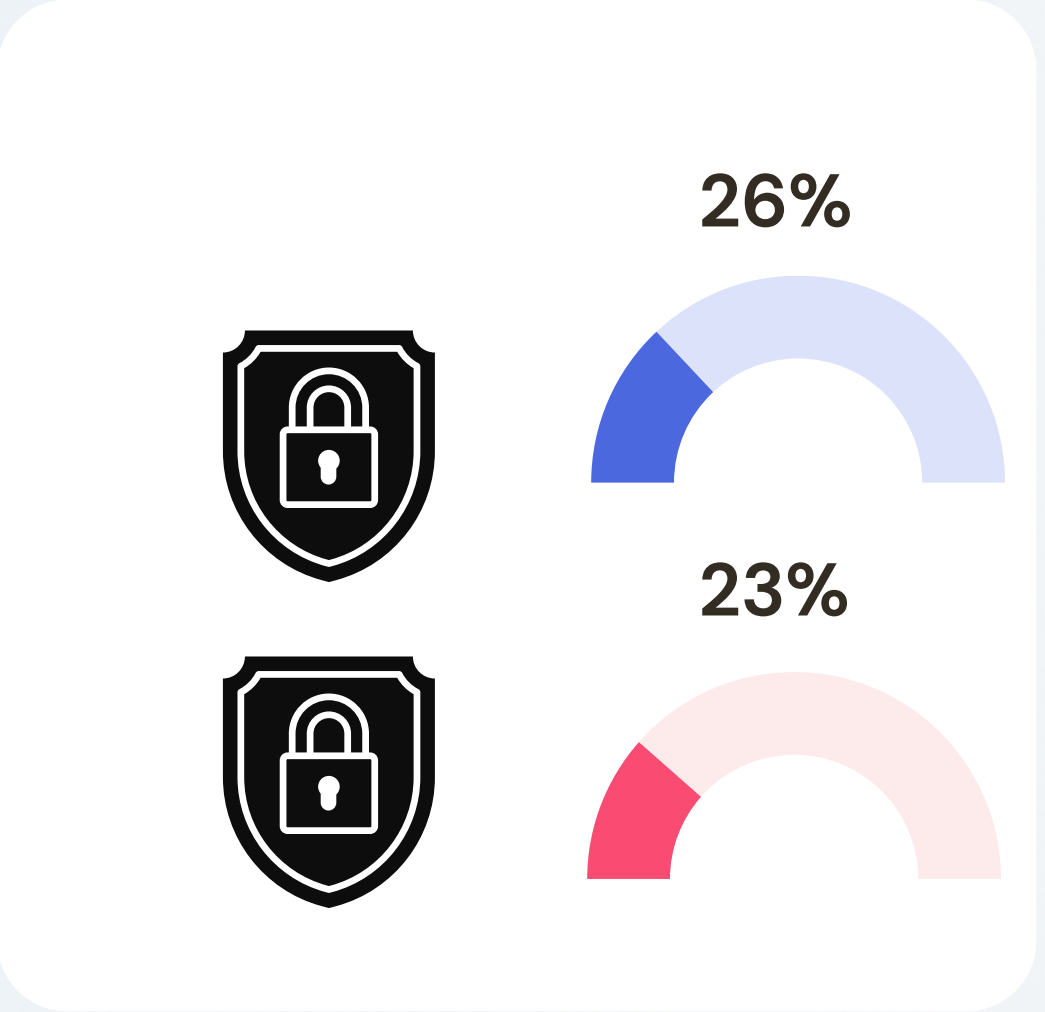
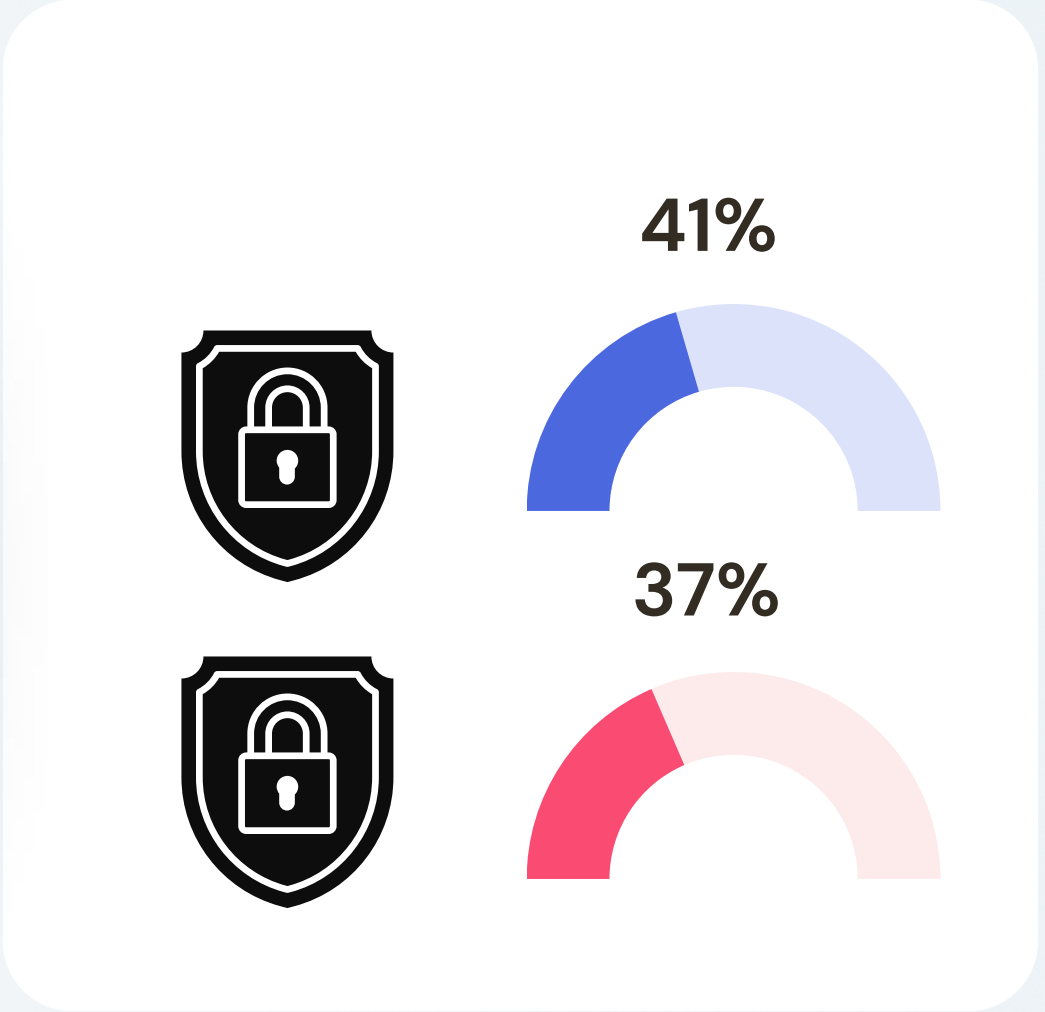
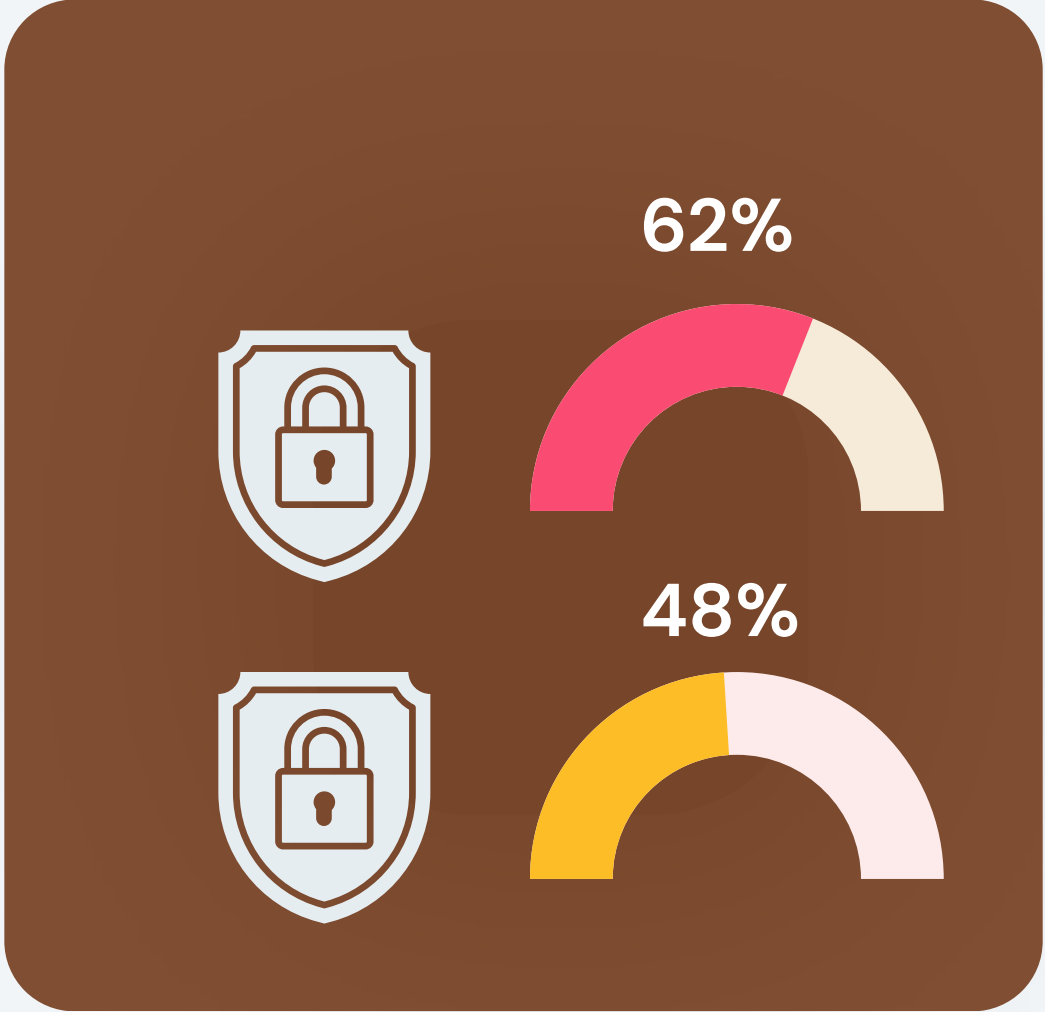
vs. 72% in 2025

Recruitment difficulty continues to rise, confirming persistent talent scarcity, especially for technical and commercial roles. Compensation competitiveness remains stable, suggesting that salary alone is no longer a differentiator.

Key exception: large organizations report slightly lower difficulty due to stronger employer branding.

Main Challenges

The dominant narrative confirms that the problem is no longer recruitment alone, but fit:



Key exception: in highly competitive markets, the problem is often fit.

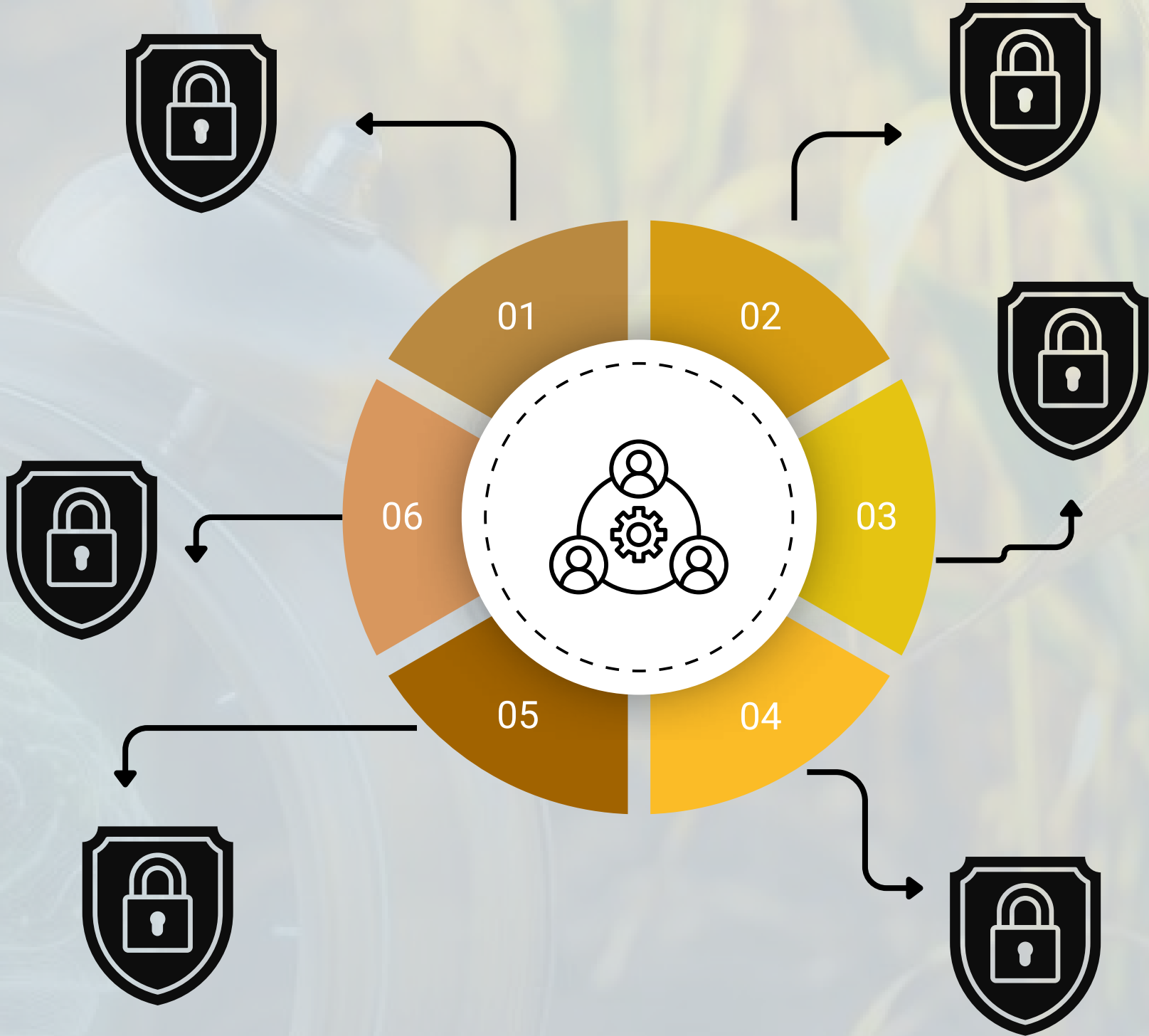
Most appreciated employee benefits



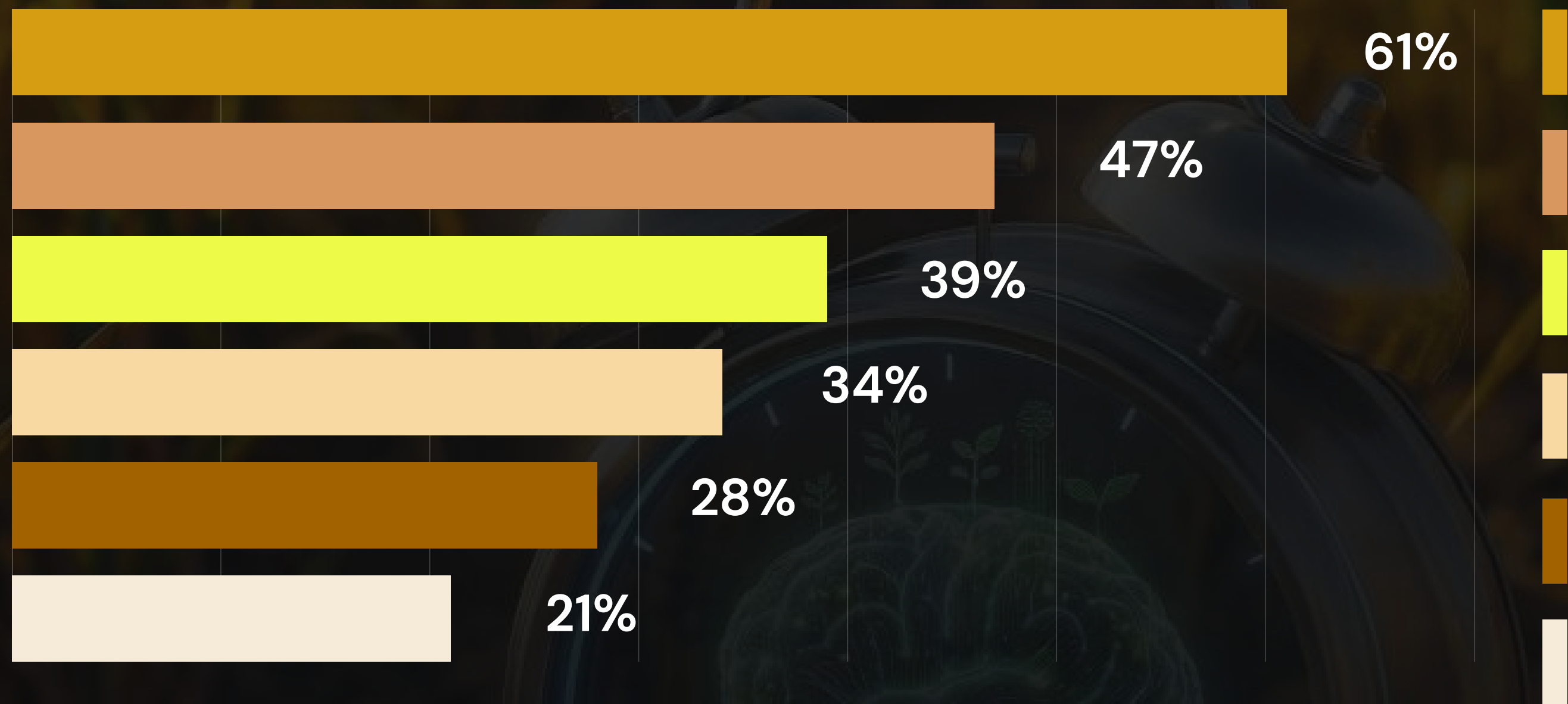
Employee benefits in agri-business are no longer
"nice to have"; they are a structural component

Overall shift (big picture)

2025: Benefits were used mainly to support attraction and compensate inflation
2026: Benefits are used primarily to protect retention and operational continuity



WHAT ATTRACTS CANDIDATES TODAY? (EMPLOYER VALUE PROPOSITION)





















Key exception: younger candidates prioritize development over stability

Compensations* - arithmetic averages

*net monthly fixed basis salaries



| POSITION | AVERAGE € | MIN - MAX € | SPREAD (%) |
|------------------------|---|---|---|
| AREA SALES REP. |  <p>YoY ↓ -6.34%</p> |  |  |
| REGIONAL SALES MANAGER |  <p>↓ -4.30%</p> |  |  |
| MARKETING MANAGER |  <p>↑ 3.25%</p> |  |  |
| TECHNICAL MANAGER |  <p>↓ -33.15%</p> |  |  |
| NATIONAL SALES MANAGER |  <p>↑ 4.30%</p> |  |  |
| GENERAL MANAGER |  <p>↑ 13.78%</p> |  |  |

ASK THE QUOTATION
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FULL VERSION**



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