

Agricultural Reinvention: 24/7 Food Production for the Digital Age

A Global Report by Futurist Jim Carroll



Agenda

1

The New Agricultural Paradigm

Defining 24/7 food production and its core tenets

2

Technological Toolkit

Controlled environments, robotics, and data systems

3

Global Deployment

Regional case studies and implementation models

4

Market Dynamics

Investment landscape and financial trends

5

The Decade Ahead

Timelines, challenges, and strategic outlook

6

Strategic Recommendations

Guidance for investors, policymakers, and operators



Part I: The New Agricultural Paradigm

Defining 24/7 Food Production

Agricultural Reinvention represents a fundamental paradigm shift in global food production - not just an improvement on existing methods, but a complete reframing of agriculture as a technology and engineering-driven industry.

Deconstructing the Terminology

The concept of "24-Hour Farming" or "Agricultural Reinvention" signifies a fundamental paradigm shift in global food production, distinct from public relations campaigns like the UK's "#farm24" initiative.

Current discourse around this transformation is fragmented, with inconsistent definitions creating barriers to coherent policy-making, regulation, and investment strategy.

- ❏ The ambiguity surrounding these terms is more than semantic - it's a tangible risk to the industry's maturation, creating hidden barriers to scaling.

Three Foundational Pillars

Controlled Environment Agriculture (CEA)

The practice of growing crops indoors within enclosed, highly managed structures. This pillar provides the physical foundation for precision and control.



Robotics and Automation

The deployment of autonomous systems to manage tasks continuously. This pillar provides the engine for 24/7 operational efficiency and scalability.

Data Science, AI, and IoT

The use of sensors, predictive analytics, and integrated software platforms. This pillar serves as the central nervous system, transforming farming into a data-driven enterprise.

Core Tenets of Agricultural Reinvention



Decoupling from Nature's Constraints

Moving production indoors into completely controlled environments, rendering geography, climate, seasonality, and soil quality irrelevant.



Farming as Engineering Science

Transforming the farm from a field to be managed into a factory or data center to be engineered, with programmable variables replacing environmental givens.



Continuous, Optimized Operations

Implementing true 24/7 production cycles through robotics, automation, and AI for constant monitoring and real-time adjustments.

Digital Terroir: Engineering Flavor

In traditional viticulture, "terroir" describes the unique character imparted to a wine by its natural environment. In the new paradigm, terroir is engineered.

The flavor, nutritional content, and texture of a crop are determined not by soil and sun, but by:

- Specific LED light recipes
- Precisely balanced nutrient solutions
- AI-controlled microclimates

This allows for standardized quality profiles that can be replicated with perfect fidelity anywhere in the world.



Strategic Implications

- ① When a strawberry's taste profile can be programmed and replicated in Dubai to be identical to one grown in Japan, it transitions from a unique agricultural good to a high-tech, replicable commodity.

This shift challenges traditional notions of premium value tied to origin and opens up new competitive landscapes based on technological prowess and intellectual property.

The lack of standardized terminology creates market friction and impedes coherent policy-making, regulation, and investment strategy.



Part II: The Technological Toolkit

The Three-Legged Stool of Agricultural Reinvention

The transformation of agriculture is powered by a synergistic stack of technologies working in concert to enable 24/7 food production.



Controlled Environment Agriculture (CEA)

The Foundation for Precision

Architectural Frameworks

- Repurposed urban infrastructure (warehouses, factories, tunnels)
- Purpose-built "plant factories" designed for maximum efficiency
- Modular systems (stacked shipping containers) offering scalability

Soilless Cultivation

- Hydroponics: Plants grown in nutrient-rich water solutions
- Aeroponics: Roots suspended in air and misted with nutrients
- Aquaponics: Integrated fish and plant production in symbiotic systems

Programmable Light

- Specialized horticultural LED lighting replacing sunlight
- Light "recipes" tailored to specific crops and growth stages
- Dynamic lighting programs adjustable via software

Light as a Programmable Ingredient

Specialized horticultural LED lighting enables 24/7 production independent of day/night cycles and seasons, transforming light from a simple energy source into a precise tool for "steering" plant biology.

Different wavelengths serve specific functions:

- Blue light (430-460 nm): Crucial for vegetative development
- Red light (640-680 nm): Stimulates flowering and fruit production
- Far-red light (730 nm): Influences seed germination and leaf expansion



Robotics and Automation

The Engine of 24/7 Operations

Automation enables continuous, round-the-clock operations, driving efficiency, reducing labor costs, and increasing precision across the entire farming cycle.



Innovative Robotic Solutions



FarmDroid FD20

Solar-powered robot that uses RTK GPS to record the exact location of every seed it plants, enabling precise mechanical weeding without herbicides.



Carbon Robotics LaserWeeder

Uses AI and computer vision to differentiate between crops and weeds in real-time, then eliminates weeds with a high-powered thermal laser.



Harvest CROO

Multi-armed robot specifically designed for picking strawberries, a notoriously difficult crop to harvest mechanically.

Data, AI, and IoT

The Central Nervous System

If CEA is the body and robotics is the muscle, then the network of sensors, software, and artificial intelligence is the farm's intelligent nervous system.

- **Ubiquitous Sensor Ecosystem:** Dense web of IoT sensors monitoring every critical variable 24/7
- **AI and Predictive Analytics:** Algorithms transforming raw data into actionable insights for anticipating problems
- **Integrated Management Platforms:** "Digital twins" of the entire operation enabling autonomous decision-making
- **Blockchain Technology:** Creating immutable records of a product's journey from seed to shelf



The "Energy vs. Everything Else" Trade-off

98%

Water Reduction

CEA systems can reduce water consumption by up to 98% compared to traditional farming

99%

Land Efficiency

Land use can be reduced by up to 99%, with a single acre in a vertical farm producing the equivalent of 10-20 acres of open field

38.8 kWh

Energy Cost

Average vertical farm consumes 38.8 kWh of electricity to produce one kilogram of crops

The model solves for the growing scarcity of land and water by substituting them with energy and capital. The long-term sustainability is inextricably linked to the transition to abundant, low-cost renewable energy.

Shift to Intellectual Property

The technological shift precipitates a fundamental change in where value resides in the agricultural sector, marking a shift from capital goods to consumable intellectual property (IP).

Examples of this evolution:

- Philips selling proprietary "light recipes" proven to enhance crop yield and quality
- Farmonaut offering satellite-based advisory services powered by analytical platforms
- John Deere transforming from equipment manufacturer to technology company with autonomous guidance systems and predictive maintenance software



Part III: Global Deployment

Case Studies in Agricultural Transformation

The adoption of Agricultural Reinvention is not uniform across the globe. Its deployment is shaped by specific regional pressures such as resource scarcity, labor demographics, economic drivers, and national strategic priorities.

Agricultural Technology Region



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Asia-Pacific: Responding to Scarcity

Japan

A mature market driven by an aging agricultural workforce, food safety concerns following Fukushima, and limited arable land.

- Government promotion through Japan Plant Factory Association since 2010
- Over 380 plant factories established by 2021
- Companies like Spread automating seedling cultivation to cut labor costs by 50%

Singapore

A critical case study in agritech as a tool of national strategy.

- "30 by 30" goal: produce 30% of nutritional needs locally by 2030
- Agri-Food Innovation Park and substantial R&D grants
- Agriculture Robots Market projected to grow at 22.9% CAGR, reaching \$72.58 million by 2030



The Middle East: Engineering Food Security

For Gulf Cooperation Council nations, Agricultural Reinvention addresses existential challenges: extreme heat, arid conditions, and profound water scarcity.

With countries like the UAE importing up to 90% of their caloric intake, building domestic production capacity is a matter of urgent food and national security.

Bustanica (UAE)

World's largest vertical farm at 330,000 square feet, producing over one million kilograms of leafy greens annually while using 95% less water

Pure Harvest Smart Farms

Leader in high-tech climate-controlled greenhouses adapted for extreme desert conditions

Red Sea Farms

Pioneering systems that use saltwater to cool greenhouses and growing salt-tolerant crop varieties

Europe: Navigating Energy Costs

The European market is more fragmented and mature, particularly in the high-tech greenhouse sector. Vertical farming is gaining ground with a forecasted market growth of 20% CAGR from 2024 to 2030.

Key Hubs

- Germany, UK, and France emerging as leaders in vertical farming innovation
- Strong research support from institutions like Technical University of Munich
- Brexit creating political impetus for food self-sufficiency in the UK

Challenges

The primary obstacles to widespread adoption in Europe are economic:

- High energy costs make the already energy-intensive model particularly challenging
- Intense price competition from produce grown in efficient greenhouses in Southern Europe and North Africa
- Economic viability of many early-stage vertical farming ventures under significant pressure



The Americas: Venture-Backed Innovation

North America represents a landscape driven primarily by venture capital and market-led innovation, with a strong focus on precision agriculture, robotics, and biotechnology.

Key Players & Strategies

- **Oishii:** Premium vertical-farmed strawberries, acquired Tortuga AgTech for harvesting robotics
- **Gotham Greens & BrightFarms:** Expanding networks of hydroponic greenhouses with major retail partnerships
- **John Deere:** Goal for fully autonomous corn and soybean production system by 2030



Two Divergent Development Models

State-Sponsored "Food Security" Model

Most evident in Singapore and the Middle East

- Primary driver is national security, not commercial profit
- Governments act as principal investors and often anchor customers
- Success measured by food self-sufficiency and supply chain resilience
- De-risks massive capital expenditures required for large-scale CEA

Venture-Backed "Market Disruption" Model

Prevalent in North America and parts of Europe

- Primary driver is commercial opportunity
- Startups raise private capital to disrupt existing markets
- Focus on high-value niche products with price premiums
- Success measured by ROI, market share, and profitability



Geopolitics of Food Production Technology

As this new paradigm matures, the ability to export not just food, but the *systems and intellectual property to produce food*, will become a new vector of geopolitical influence.

Strategic documents from the Middle East already reveal awareness of this shift, emphasizing the goal to develop capacity to manufacture and adapt these technologies locally rather than simply importing them.

⚠ A nation that perfects an energy-efficient, scalable CEA system for a staple crop could export this "farm-in-a-box" solution to other resource-scarce countries, creating a new form of strategic dependency.

This would transform food security from a trade issue into a technology-transfer issue, with diplomatic and economic leverage akin to energy or defense exports.

Part IV: Market Dynamics

Investment Landscape and Financial Trends

The financial underpinnings of Agricultural Reinvention are as dynamic and complex as the technologies themselves, with capital flows shaping the pace and direction of innovation.

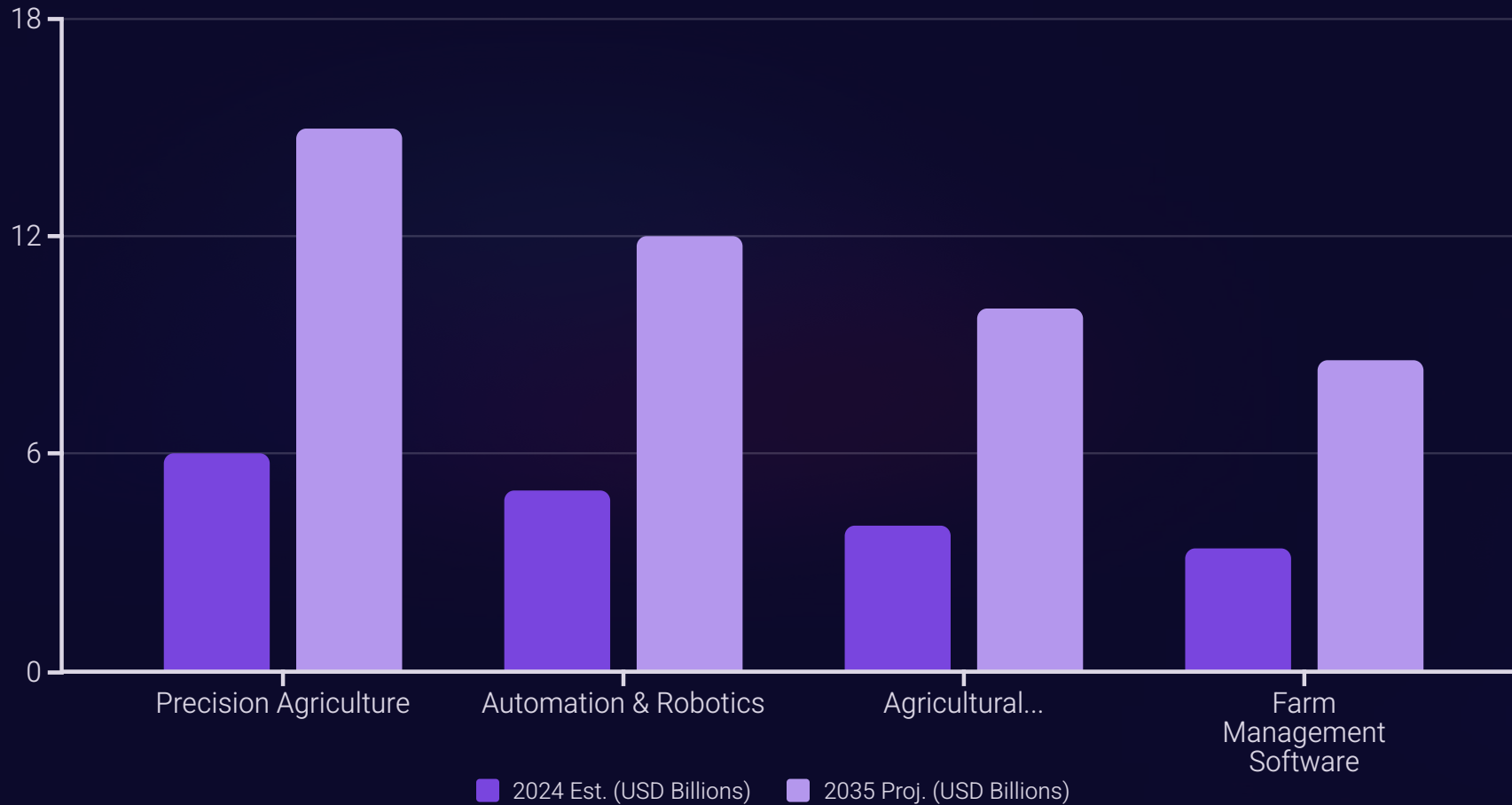


Global Agritech Market: Size and Forecasts



The overall Agritech market is on a strong growth trajectory, with projections to more than double from \$24.42 billion in 2024 to \$48.98 billion by 2030, representing a CAGR of 12.3%.

Key Agritech Market Segments



All key segments supporting the 24/7 farming paradigm show strong projected growth, with implied CAGRs of approximately 8.5-8.8% between 2025-2035.

Investment Flows: A Shifting Landscape

While the overall market is growing, the flow of venture capital has become more discerning. After a period of exuberance, global agrifoodtech funding experienced a significant downturn in 2023 but showed signs of recovery in 2024.

A crucial trend is emerging: a divergence in where capital is being allocated.



CEA Funding

Direct funding for capital-intensive CEA operations declined by \$125 million in 2024 compared to the previous year



Precision Agriculture

Attracted an estimated \$8.9 billion in 2024, a 12% year-over-year increase



AgBioTech

Garnered \$6.1 billion in 2024, a significant 17% increase, with focus on gene-editing technologies



From "Gold Mines" to "Picks and Shovels"

The investment pattern indicates a maturation of the investment thesis. The initial wave of hype focused on building the "gold mines"—the vertical farms themselves.

Now, more sophisticated capital is flowing towards the "picks and shovels"—the enabling technologies that make all forms of agriculture more efficient and profitable.

- ① Investors have recognized that funding another capital-intensive farm carries significant operational and market risk. In contrast, funding a company whose technology can be sold to hundreds of farms represents a more scalable, less asset-heavy investment.

This is a classic flight from hardware-heavy operational risk to software- and IP-driven scalability.

The Role of Government and Policy



European Union

The EU's Horizon Europe research and innovation program has allocated substantial funding, reported as high as \$10 billion, that supports agritech development as part of its broader goals.



Canada

The Sustainable Canadian Agricultural Partnership is a five-year, \$3.5 billion joint federal-provincial investment aimed at strengthening innovation, competitiveness, and efficiency in the agri-food sector.



India

Initiatives like the Digital Agriculture Mission (2021-2025) and the Agriculture Accelerator Fund are specifically designed to support startups utilizing technologies like AI, IoT, and drones.



United States

The US Farm Bill consistently allocates hundreds of millions of dollars to support the adoption of precision agriculture technologies and climate resilience.

Full-Stack Integration Strategy

The financial pressures on standalone vertical farm operators are likely to drive a wave of mergers, acquisitions, and failures in the coming years.

The operators most likely to survive and thrive will be those who successfully pursue a "full-stack" integration strategy—moving beyond simply operating farms to owning proprietary technology across critical parts of their value chain.



The strategic acquisition of robotics firm Tortuga AgTech by vertical farm operator Oishii exemplifies this trend, bringing automated harvesting technology in-house to address labor costs and gain competitive advantage.



Part V: The Decade Ahead (2025-2035)

Timelines, Challenges, and Strategic Outlook

The next ten years will be transformative for Agricultural Reinvention, marked by distinct phases of technological development, significant challenges, and a fundamental reshaping of the agricultural landscape.

Projected Development Timeline



Critical Challenges to Scalability

Economic Viability

High Capital Expenditure (CAPEX) for building facilities and Operational Expenditure (OPEX) for running them. A 2020 Cornell study found lettuce from indoor farms in Chicago or New York was more than twice as expensive as conventionally grown lettuce shipped from the West Coast.

Energy Consumption

The largest component of OPEX and greatest sustainability threat. CEA facilities are 4-10 times more energy-intensive than high-tech greenhouses, with potential carbon footprints of 18.43 kg CO₂ per kg of crop if powered by fossil fuels.

Technological & Biological Hurdles

Limited crop diversity (primarily leafy greens and berries), pollination challenges for fruiting crops, and a significant workforce gap requiring skills in horticulture, data science, engineering, and robotics.

Social and Labor Implications

Displacement of traditional farm labor, need for massive workforce retraining, and potential mental health impacts from the shift to a 24/7, data-intensive, highly automated environment.

Symbiotic Link Between CEA and Renewable Energy

The greatest weakness of CEA is its immense energy demand. The greatest weakness of renewable energy sources like solar and wind is their intermittency. This creates a powerful opportunity for symbiosis.

CEA facilities, with their 24/7 operational capability and high energy needs, can act as "demand response aggregators," ramping up operations during periods of peak renewable generation and scaling back during lulls, helping to stabilize the electrical grid.



The integration of on-site generation (solar, wind) and battery storage will become standard, transforming the farm from a simple energy consumer into a strategic asset for the renewable energy grid.

Bifurcation of Agriculture by 2035

The "Intensive Tech" System

Capital-intensive, urban or near-urban CEA facilities focused on high-value, perishable, and nutritionally-tuned crops:

- Leafy greens, berries, high-value vegetables
- Pharmaceutical-grade botanicals
- Minimal land and water use, high energy and technology inputs
- Strategic value in supply chain resilience, food safety, and quality control

The "Extensive Tech" System

Traditional field agriculture radically transformed by automation and data:

- Bulk commodity crops (wheat, corn, soy, rice)
- Operations managed by autonomous tractors and drones
- Precision application of inputs based on AI and satellite monitoring
- Maximized yield and efficiency over vast land areas
- Fundamentally dependent on climate and geography

The future is not a choice between systems but a hybrid where these two sophisticated branches coexist, each optimized for different purposes.



Part VI: Strategic Recommendations

Guidance for Key Stakeholders

Navigating this transformation successfully over the next decade will require strategic focus, a clear understanding of the underlying trade-offs, and proactive policy-making.

For Investors



Diversify Beyond the Farm

The most scalable and potentially least risky investments lie in the enabling technologies—the "picks and shovels"—rather than the farms themselves. Focus on companies with technologies that have broad applications across both CEA and modernized traditional agriculture:

- AI and machine learning software for yield optimization
- Robotics (especially soft robotics for harvesting)
- Advanced sensor technology
- Biotechnology (gene-editing for indoor-optimized crops)



Vet the Energy Strategy

For any direct investment in a CEA operation, the energy strategy is the single most important factor determining long-term viability. Scrutinize the business plan for a clear path to securing low-cost, preferably renewable, energy.



Look for Full-Stack Integration

Prioritize companies pursuing a "full-stack" model—not just operating growing facilities but actively developing or acquiring proprietary IP in genetics, software, and automation.

For Policymakers



Create Coherent Regulatory Frameworks

Establish clear, consistent, and supportive regulatory frameworks for CEA. Define CEA explicitly in land use zoning, building codes, and tax law to reduce uncertainty and streamline the approval process for new facilities.



Incentivize the Food-Energy Symbiosis

Design incentives that encourage the critical link between CEA and renewable energy:

- Tax credits for co-locating vertical farms with renewable energy installations
- Preferential electricity rates for farms providing grid-stabilization services
- Grants jointly funding food and energy infrastructure projects



Fund the Workforce Transition

Invest proactively in workforce development through public-private partnerships between industry, vocational schools, and universities to create training programs in horticulture, data science, robotics, and engineering.

For Industry Operators



Start with Economics, Not Just Technology

Focus first on achieving economic viability with high-value crops in a specific market before pursuing aggressive expansion. The struggles of companies like AeroFarms serve as a warning against scaling too quickly without a proven business case.



Embrace the "Energy vs. Everything Else" Trade-off

Actively manage energy as the most critical operational variable through energy-efficient systems, facility design to minimize thermal loss, and pursuit of low-cost renewable energy contracts or on-site generation.



Build a Data Moat

Treat operational data as a core strategic asset. The vast amounts of data generated on environmental conditions, inputs, and crop performance can be used to develop proprietary optimization algorithms, creating a powerful competitive advantage.

Learn More About Agricultural Reinvention

By 2035, "24-Hour Farming" will have evolved from a futuristic vision into a tangible reality, establishing a parallel, high-tech food production system that enhances urban food security and supply chain resilience.

The success of this reinvention will depend on the ability of operators, investors, and policymakers to skillfully navigate the complex trade-offs between resources, costs, and sustainability.

Visit
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For more insights from Futurist Jim Carroll on the future of agriculture and food production

