

GLOBAL PRECISION FARMING MARKET THE FUTURE IN EUROPE

Lisbon, February, 2015
ANPROMIS Congress

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GLOBAL PRECISION FARMING MARKET

- Global market Precision Farming equipment is growing rapidly
- Not without reason
- **Be present yourself**

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GLOBAL PRECISION FARMING MARKET

- Global market Precision Farming 2013:

1.5 billion Euros

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- Global market precision Farming 2013:
- CAGR (**C**ompound **A**nnual **G**rowth **R**ate)
= **13.36 %**

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- Global market precision Farming 2018:
- forecast to grow to a total of around 2.8 billion EURO by the end of 2018

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- Global market Precision Farming
- From 2013 to 2018

From **1.5 billion** Euros in 2013
To **2.8 billion** Euros in 2018:

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- Why this growth??
- The world population is growing rapidly!!
- **Farmers are competing to feed all of them**

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- **The world population**

In 1800 : 1 billion

In 2011 : **7 billion**

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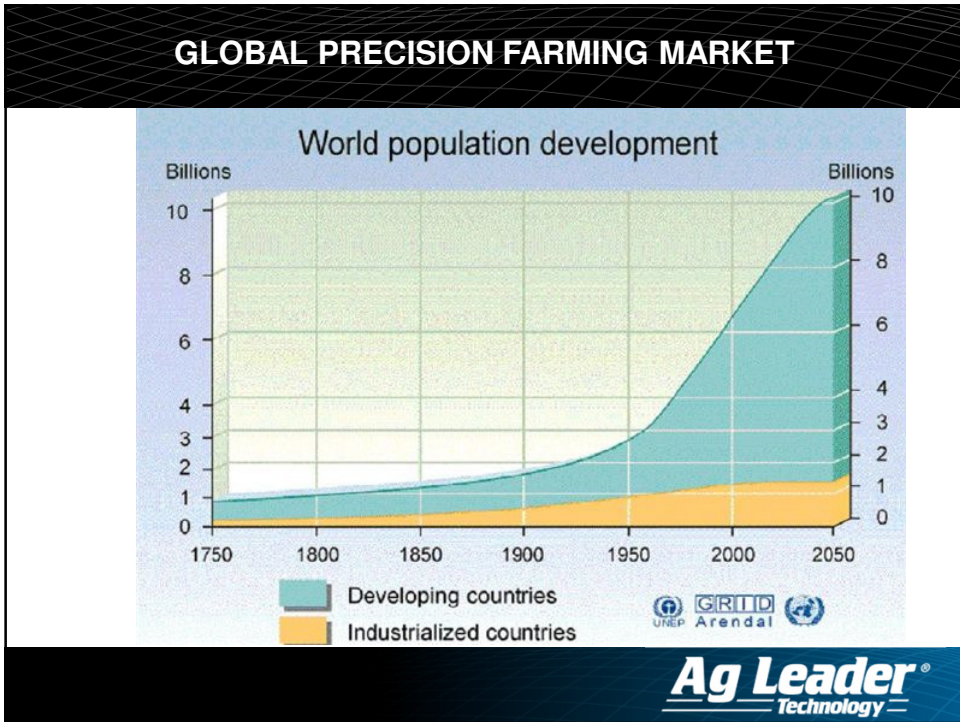
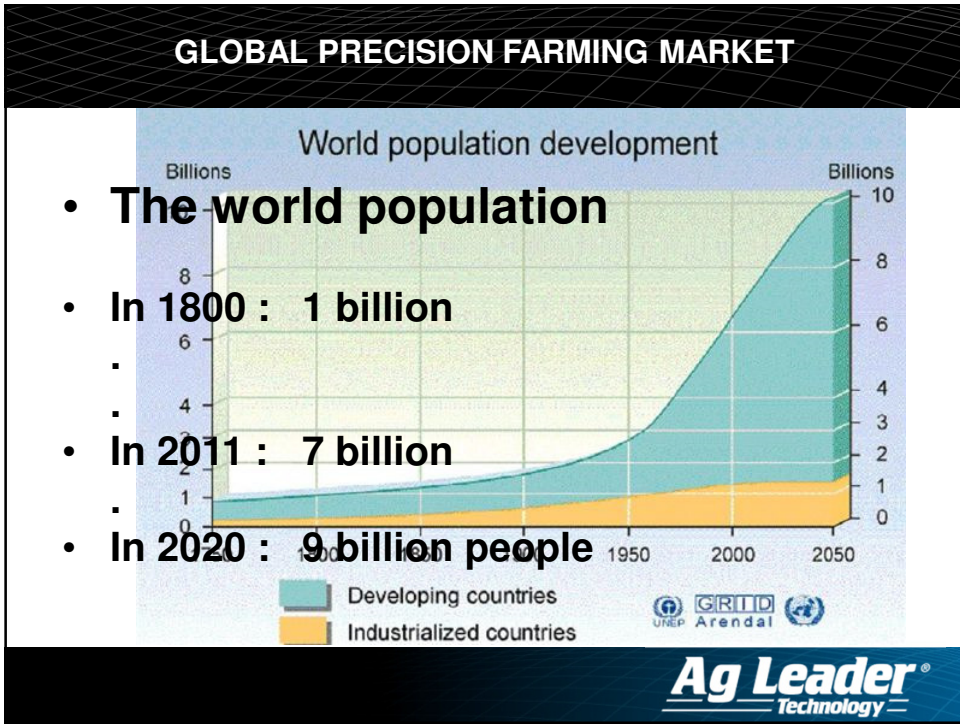
- In 2011:
135 million people were born and
57 million died
- **In 2011:**
an increase in population of **78 million.**

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- **The world population**
- In 1800 : 1 billion
 -
 - 211 years
 -
- In 2011 : 7 billion
 -
- In 2015 : 7.5 billion people
- In 2020 : 9 billion people

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- UN population division indicates:

	2010	2050
Africa	1 billion	2 billion
Asia	4.2 billion	5.2 billion
Europe	733 million	691 million
Latin America	588 million	729 million
North America	362 million	448 million

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- An ever increasing demand for food,
is a continuing “plague” to the world.

Or is it an opportunity??

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- Global food production needs to increase
- More than 40% by 2030
- More than 70% by 2050

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► Classement mondial des pays exportateurs de produits transformés en milliards d'€
Source : MAAP SEP d'après les données Douanes/Libranze

Year	ETATS-UNIS	PAYS BAS	ALLEMAGNE	FRANCE	BRESIL	CHINE	BELGIQUE	ITALIE	ESPAGNE
2004	23	25	26	28	16	14	17	16	13
2005	26	27	29	30	20	15	18	17	14
2006	29	28	32	32	22	17	19	18	15
2007	31	33	35	33	23	18	20	19	16
2008	35	41	40	35	25	18	21	20	18
2009	34	38	38	33	23	18	20	19	16
2010	42	42	42	36	30	24	21	20	18
2011	48	46	46	40	33	28	23	21	21

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- What do we learn of these graphs?
- A big country as USA exports a lot
 - Maize and soybeans
- A small country as Holland exports a lot
 - High value crop, high tech farming!
- An average country as Germany exports a lot
 - High level of technique

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- All these countries have a high level of acceptance of precision farming.
- Precision farming is being competitive:
- **Reduce costs \ Increase yields.**

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- All these countries have a high level of acceptance of precision farming.
- USA: extreme accuracy in corn and soybeans
- Europe high level of precision.

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- **Farmers will have to produce more,**
- **with less impact!!**

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- See the developments in industrial countries.
- Higher production, at lower costs.
- See Bio energy solutions in N-Europe.
- **Be competitive, be precise!**

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- Large scale adoption
- of new technologies
- will have tremendous economic
- and environmental benefits
- that absolutely needs to be implemented.

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- That absolutely will be implemented,
- By the winners.

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- Worldwide agriculture will have to move from middle age practices,
- to also start an industrial revolution.

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- **Alcimed France** donne l'exemple de la culture du blé au Royaume-Uni dont les rendements pourraient croître de 25 % grâce à l'agriculture de précision.
- Alcimed gives the example of the culture of grain in the United Kingdom, whose yield could grow with 25% thanks to precision farming.

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GLOBAL PRECISION FARMING MARKET

- Ag Leader has the full focus on Agriculture,
- on Precision farming.

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GLOBAL PRECISION FARMING MARKET

- Ag Leader has the full focus on Agriculture, on Precision farming.
- Precision farming is spray section control, seeder control, crop sensor and VRA, yield monitoring.


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GLOBAL PRECISION FARMING MARKET

- Ag Leader has the full focus on Agriculture, on Precision farming.
- Water management will get more and more important, and moisture control, and agronomic advise.
- VRA


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ROI, RETURN OF INVESTMENT



Sprayer Width  <p>24m</p>	Average Farm Input Savings is  <p>7%</p>	Input Costs  <p>€ 230/ha</p>	Savings  <p>€ 16/ha</p>	ROI for AutoSwath™  <p>520 hectare</p>
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*Figures are examples only and may vary depending on the region in which the data is based on.



ROI, RETURN OF INVESTMENT

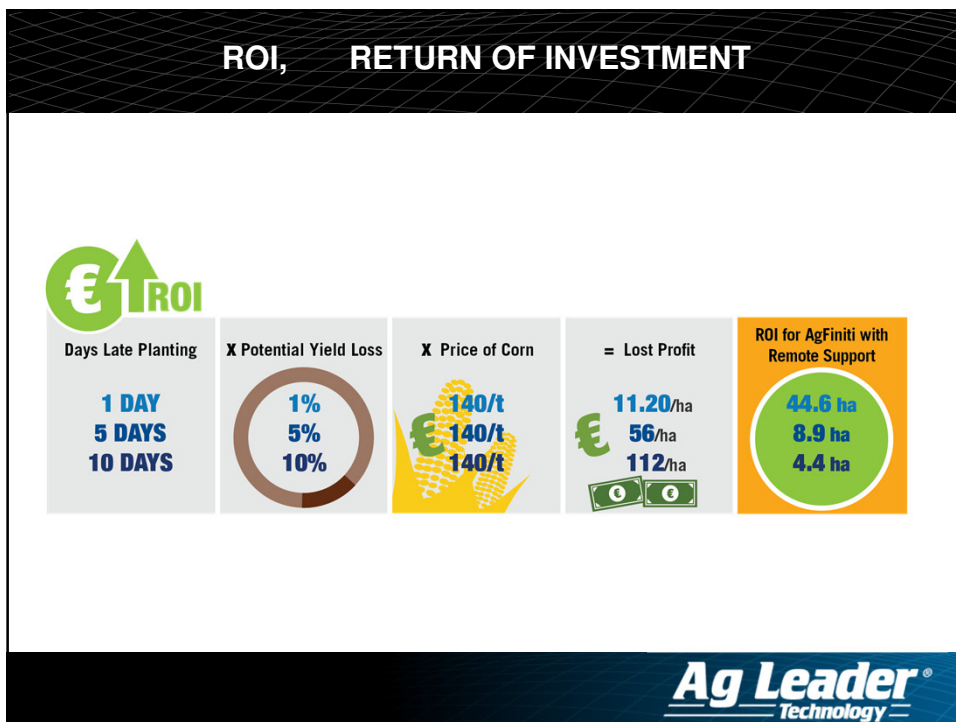
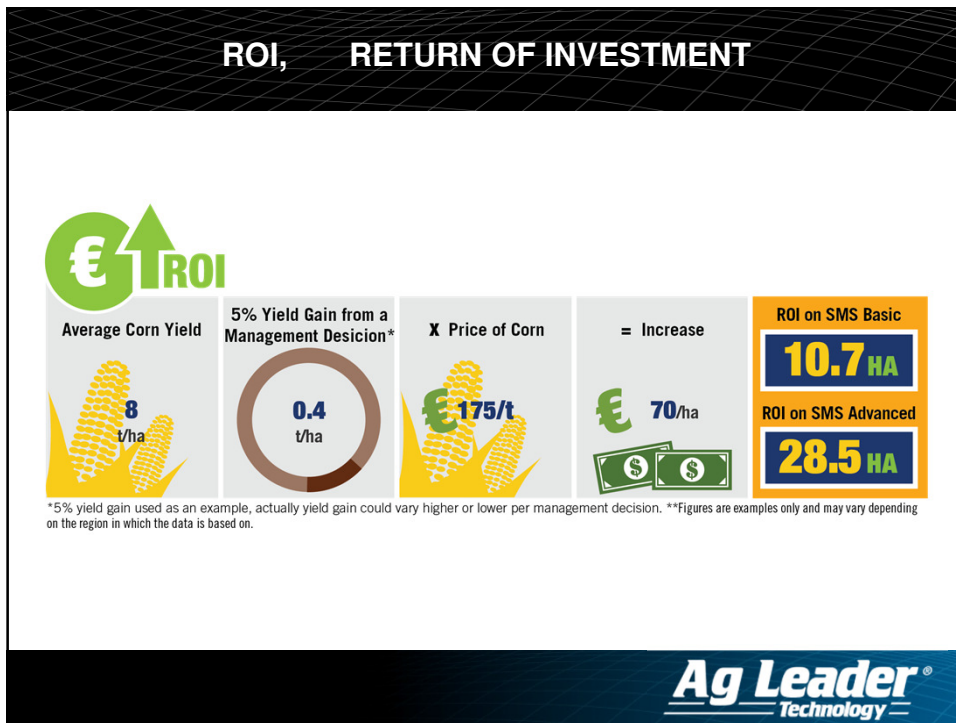


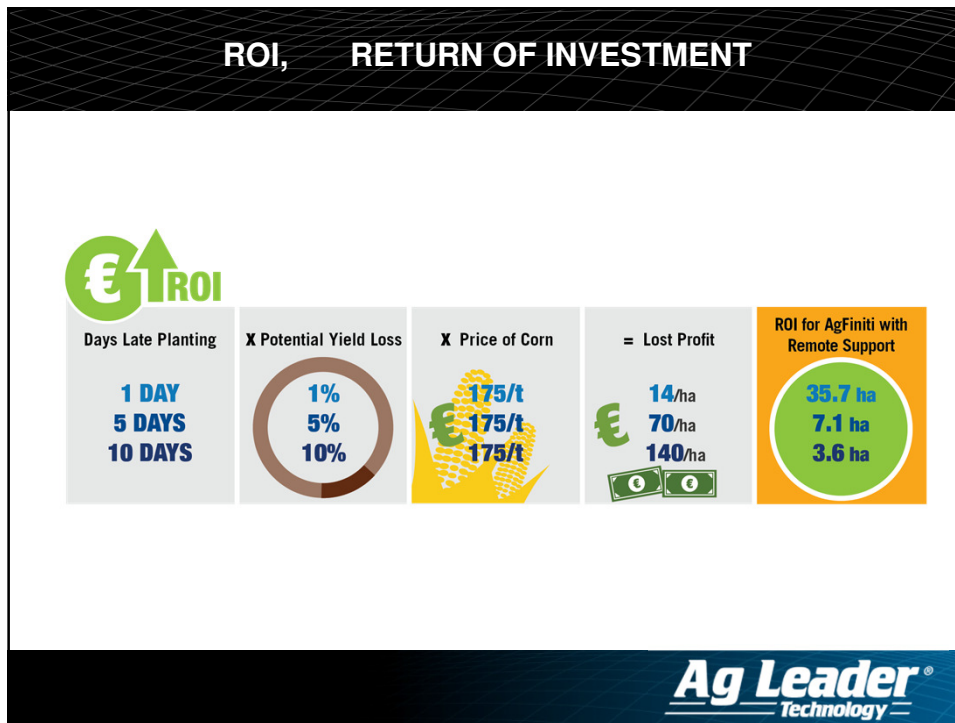
60cm overlap on 6m cultivator = 10% overlap 	400ha farm =  <p>40 ha overlap</p>	X cost of drillage operation  <p>€ 30/ha (inc labour)</p>	= cost of overlap  <p>€ 1200</p>	ROI  <p>10-11 passes with Cultivator 3-4 years. Based on RTK Steer Command.</p>
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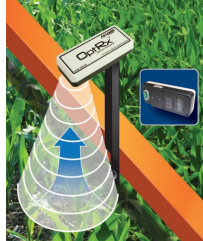







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- For management
Ag Leader launched OptRx.



- The farmer can control the real actual status of the crop.
- The farmer can manage with real data.



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- For management
Ag Leader launched AgFiniti.
- The farmer can control, and communicate.
- The dealer can service remotely.
- **This is of great importance for developing countries especially.**



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- For farm-management
Ag Leader developed SMS software.
- The farmer, the farm-manager, can control,
and manage.
- **Reduce costs \ Increase benefits**
And take maximum care of environment.

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- Precision Farming is the future, to
- feed the global population
- save the environment
- make Farming more effective.

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**Ag Leader Technology is one
of the biggest players in the market,**

**and investing heavily in
Research and Development**

**to make you be competitive
in the world.**

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Thank you

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