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Also Inside:

State of Herbicides, p.44 | Scouting Tools, p.52

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Ag retailers look for economic stability after a stormy year.
Report starting on p.9

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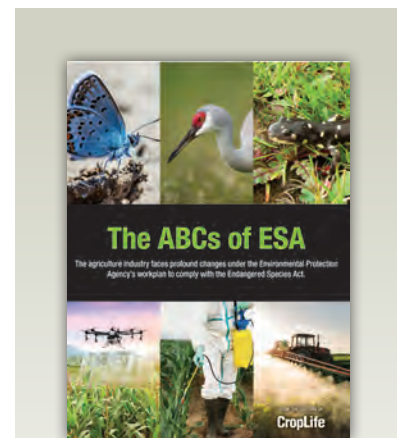
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UPFRONT

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Eric Sfiligoj

Not the 'End of the World' for Agriculture

AS ANOTHER AGRICULTURAL YEAR DRAWS TO A CLOSE, I'm once again reminded of that old riddle: Why does the end of the world never come?

Now in one sense, I get it. This year, 2024, was extremely rough for the agricultural marketplace on the whole. Although crop input prices moderated somewhat from their highs during 2022 and 2023, worldwide commodity prices also dropped significantly. All throughout the summer and fall trade shows, I heard many speakers talking endlessly about \$3 corn and \$7 soybeans.

Part of the reason for these price declines tied back to slowing demand for U.S. crops from key export partners such as China. This pushed the carryover numbers – the amount of corn and soybeans left in reserve for use within the country – to near-record highs as well, furthering depressing commodity futures.

Ag retailers, too, felt this strain.

In this issue of *CropLife*, readers will find the financial outlook for cooperatives and dealerships in our annual *CropLife 100* report. Needless to say, 2024 will register as a “down year” for the market, with overall revenues declining more than \$3 billion year-over-year from the 2023 *CropLife 100* report. The majority of these losses were concentrated in two categories – fertilizer and ag tech services/products. In recent years, these two categories showed significant growth.

Naturally, with such bad news dominating the agricultural marketplace as the industry concludes the 2024 growing season, the feelings regarding the outlook for 2025 definitely have an “it’s the end of the world” vibe.

In fact, according to an end-of-the-year survey by Purdue University/CME Ag Group, farmer sentiment during the early fall of 2024 hits its lowest level since 2016. Furthermore, commodity futures for the upcoming 2025 wintertime frame are showing below \$3 per bushel corn prices might persist for some time to come.

Ag retailers are also predicting the “end of the world.” According to the 2024 *CropLife 100* survey, respondents say their grower-customers rank the 2025 growing season as a solid “five” on a scale of one to 10 in terms of overall outlook, with one being the worst and 10 being the best. In prior years, the outlook number landed in the seven to eight range.

Overall, this doesn't bode well for next year. However, consider a few key positive points.

First off, the decline among ag retailer revenues. In 2024, fertilizer prices dropped back to “normal levels” from their post-pandemic highs. While *CropLife 100* respondents did see declines in fertilizer revenues, most indicated that their application rates remained relatively steady. So, this category should see a recovery in 2025.

And export markets might again open up for U.S. crops. According to recent reports by CoBank and USDA, continued droughts in countries such as Brazil have already steered many nations back to U.S. crops.

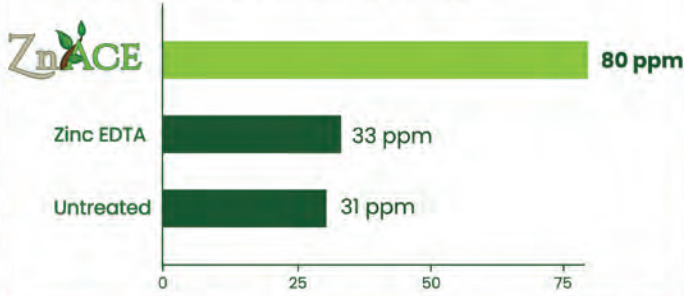
Finally, as a wise industry friend once told me: “No matter what, U.S. growers WILL grow crops next year.”

So, back to the riddle: Why does the end of the world never come? Answer: Because it's round.

And so are agricultural cycles.

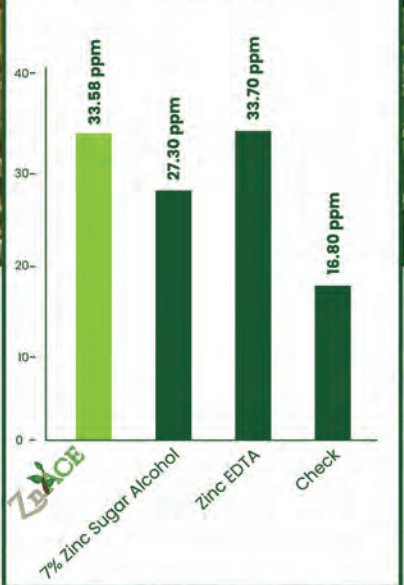
THE PROOF IS IN THE NUMBERS

2024 Zinc Foliar Tissue Analysis Trial



This third party research trial was conducted in 2023. ZnAce was applied at 2 quarts per acre and applied zinc concentrations were equal. CultivAce ZnAce drastically increased tissue zinc

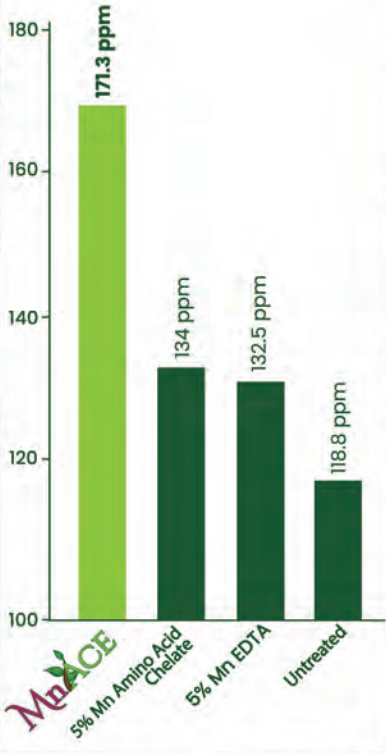
2024 Zinc Soil Applied Tissue Analysis Trial



Three zinc products were tested as soil applied nutrients to compare uptake effectiveness. ZnAce increased zinc levels by 22% over zinc sugar alcohol.

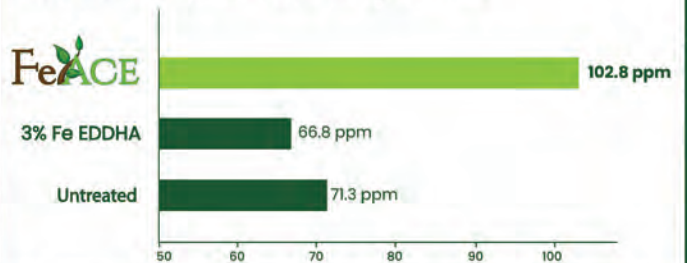
ZnAce performed as well as EDTA increasing tissue zinc levels by 100% over the check, demonstrating the effectiveness of ZnAce as both a foliar and soil applied treatment

2024 Manganese Foliar Tissue Analysis Trial



This third party research trial was performed in 2023. MnAce was applied at 2 quarts per acre and all other manganese products were applied at equal concentrations. CultivAce MnAce vastly increased tissue manganese levels by 29.28% over EDTA and 44% over check

2024 Iron Foliar Tissue Analysis Trial



This treatment was performed in 2023. FeAce was applied at 2 quarts per acre and applied iron concentrations were equal. CultivAce FeAce vastly increased tissue iron levels by 53.89% above EDDHA.

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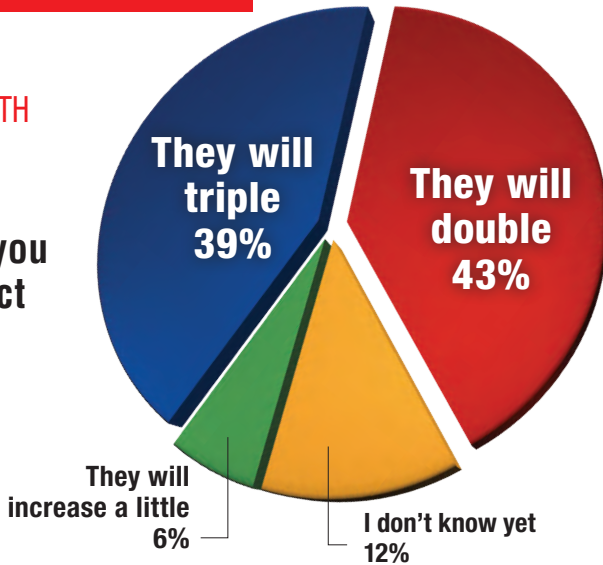
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Reader Reaction

POLL OF THE MONTH

Under new ESA rules, how long do you expect product registrations to take?

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TRENDING

Most searched terms on CropLife.com during October 2024

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Post Of The Month

Ron Hays @Ron_on_ROM



Global Wheat Shortfalls Could Signal Bullish Potential for U.S. Wheat dlvr.it/TFtM1d

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TOP 5 MOST-VIEWED ARTICLES ON CROPLIFE.COM

(October 2024)

- 1 2024 *CropLife* IRON Product of the Year: Voting Is Now Open
- 2 The Biologicals Boom: What's Driving the Market for Biostimulants, Biopesticides and Biofertilizer?
- 3 CPDA: What EPA's Final Herbicide Strategy Means for Farmers, Retailers
- 4 The Impact of ESA on Crop Protection Registrations
- 5 At WinField United, Remembering 'People Power'

FEATURED VIDEO



FROM CROPLIFE.COM

CropLife Retail Week: The 500th Episode!

Eric Sfiligoj and Lara Sowinski look back at 9.5 years' worth of *CropLife* Retail Week videos.

Coming Next Month

State of the Industry 2025

With 2024 behind the industry, agriculture is preparing for what's to come in 2025. There are still myriad issues facing the market – equipment sector slowdowns and commodity prices among them. How will 2025 play out? This series of stories will aim to find out. Our annual State of the Industry report will look at how the total ag retail sector is performing in challenging market times and what 2025 might hold for the market. Sectors to be focused on will include seed, crop protection products, fertilizer, and results from the 11th annual Buying Intentions survey, which will include charts and graphs.



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In today's challenging market, ensuring crops are getting everything they need to reach their yield potential is as critical as ever. However, the data shows that many crops are not.

In fact, on average, nearly 70% of corn plants are deficient in three vital micronutrients: zinc, manganese and boron. This is based on more than a decade of WinField[®] United NutriSolutions[®] tissue sampling data collected from across the country¹. These micronutrients play a role in everything from leaf growth to disease resistance and are essential to maximizing crop performance.

Zinc is required for the production of auxin, a well-known plant growth hormone, which is crucial to aid in leaf growth, cell elongation and early ear development. Manganese is essential for photosynthesis and plays a crucial role in plant disease resistance. Boron influences cell development and is essential for nitrogen metabolism and reproduction.

A deficiency in any one of these three key micronutrients can erode a crop's yield potential, but when all three are lacking, that yield potential can be severely compromised.

Getting the right combination at the right time.

Bill Fordice, owner of Fordice Farms in Russellville, Indiana, has seen the effects of nutrient deficiencies with his own eyes and in his own fields. He says that without the proper nutrients at critical growth stages, his corn and soybeans struggle to reach their full potential.

"We know our crops utilize a significant amount of nutrients during their rapid growth stages," said Fordice. "We've found that a nutrient boost is always needed."

It's why Fordice consulted with Darren Wiatt, his agronomy specialist at Keystone Cooperative, Inc., on a solution that would ensure his crops had a supply of critical micronutrients available when they needed them most.

"MAX-IN Ultra ZMB Plus gives us a nice boost during those time periods where plants really start using those micronutrients," said Wiatt. "It's our job to not allow the corn or soybean plant to have a bad day, and part of that is utilizing the exceptional products available to us to maximize our efforts. We like to use MAX-IN Ultra ZMB Plus to hit on a combination of nutrients we tend to be low on."

MAX-IN Ultra ZMB Plus, a foliar micronutrient, combines a high-load blend of zinc, manganese and boron into one convenient and effective treatment. It can be applied any time in corn and soybeans, mixes easily and is compatible with other plant nutrients and most crop protection products. This includes likely herbicide tank-mix partners such as Enlist[®], dicamba and glyphosate-based herbicides and many fungicides, making it ideal for early- and late-season herbicide, insecticide or fungicide (HIF) applications.

This season, Fordice included MAX-IN Ultra ZMB Plus with his postemergence herbicide application in his corn and with his fungicide application in his soybeans and noticed a big difference.

"We did tissue samples and yield tests, and we've noticed a significant difference in our crops utilizing of the nutrients from MAX-IN Ultra ZMB Plus," said Fordice. "It's proven to be a great way to get a quick nutrient punch."

- BILL FORDICE, OWNER OF FORDICE FARMS IN RUSSELLVILLE, INDIANA.

To learn more about MAX-IN Ultra ZMB Plus micronutrient, scan the QR code or talk to your local WinField United representative.



¹ Average based on 221,050 tissue samples from the WinField United Tissue Sample Treasury across V4-R2 growth stages from 2012-2022.

CropLife 100

The 41st *CropLife* 100

Taking the pulse of the one of the agricultural industry's most important segments — the ag retailer.

EVERY YEAR, VARIOUS PUBLICATIONS around the globe have devoted time to examining how their primary target audience has performed during the past 12 months. Here at *CropLife*® magazine, we are no different. Each and every year for the past 41 years, we've sent out surveys to our readership to find out numerous things — how they've done, financially, during the current year, what concerns/opportunities they see in the marketplace, and how they expect to perform during next year's season.

The result of these efforts is the annual *CropLife* 100 report, which you now hold in your hands. Throughout the decades, the data from this survey has been the benchmark among agricultural industry watchers and experts to gauge how one of the most important and influential segments of the business is doing — the ag retailer.

For the 2024 *CropLife* 100 report, we are proud to have WinField United as our official sponsor. This well-known, agricultural-focused company is no stranger to ag retail. The company has direct ownership in one of the *CropLife* 100's largest entities — GreenPoint Ag — and numerous partnerships with other ag retailers that are ranked within the annual *CropLife* 100 listings.

And WinField United knows the value ag retailers bring to the agricultural table. In fact, according to Leah Anderson, President of WinField United and Senior Vice President for

Land O' Lakes, ag retailers are one of the major focuses for the company and its industry mission.

"We have a purpose as WinField United: To enable the retailer to be the hero at the farmgate," says Anderson. "We are not the only player in the marketplace. What makes us unique is that we're taking the millions of data points our system produces every year and putting them to work through the local connections and leadership of our retail owners. We want to help the people in this industry achieve their greatest potential — whether they are our own employees, our retailers, or the farmers they serve."

In her mind, says Anderson, this pairing of technology knowhow and data-backed insights with "a personal touch" is the key for WinField United and its retail owners in achieving a key marketplace goal: Relevancy.

"If you look at what's going on in agriculture today, we have a challenging macro environment, challenging economics, and new risks appearing all the time that the country's farmers are facing," she says. "With all this in mind, we want to make sure that WinField United and our retail owners are staying relevant to provide the greatest value to America's farmers."

On the following pages, readers can find out for themselves how this "drive for relevancy" played out for the nation's top ag retailers during 2024.

— *The Editors*

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The 2024 *CropLife* 100

Weathering a Rough Year

Photo: Bjorn B / stock.adobe.com

The overall numbers for the nation's top ag retailers were less than stellar in 2024. However, there were some positive signs, particularly going into 2025.

BY ERIC SFILIGOJ
EDITOR

AS A SNAPSHOT OF WHAT'S GOING ON IN THE AG RETAIL BUSINESS, the annual *CropLife 100* report can be incredibly insightful. Of course, not every growing season tells a positive story — at least at first glance.

And at first glance, the 2024 growing season was not one the nation's top ag retailers will remember fondly. According to the 2024 *CropLife 100* survey, the largest ag retailers recorded revenues totaling \$43.3 billion this year. While an impressive number by itself, this represented a \$3.4 billion decline from the 2023 totals, a 7.2% drop.

For the most part, virtually all of the members of the *CropLife 100* experienced a down revenue year in

2024 vs. 2023. This represented quite a change from just a few years ago. For instance, back in 2022, 99 out of the 100 nation's top ag retailers saw sales increases year-over-year for their crop inputs/services offerings. In 2024, the number of *CropLife 100* ag retailers recording sales gains for the year was only 15. The vast majority — 57 — saw across the board sales declines this growing season. The remainder had flat sales.

Perhaps not surprisingly, this “concern” over prices also came through loud and clear in the overall 2024 *CropLife 100* survey results. In most years, when ag retailers are asked what their major concerns/worries are and are expected to be during the upcoming growing season, finding/keeping good employees (a.k.a., labor) tends to dominate the percentages. In 2023,

for example, labor worries were cited by 34% of *CropLife 100* ag retailers as their top challenge going into the 2024 growing season. This far outpaced every other major concern by almost 10%.

As always, *CropLife*® magazine would like to thank all the *CropLife 100* retailers that decided to take part in the annual *CropLife 100* survey, for helping to make this report possible. We appreciate their time spent filling out our annual survey form. On the following pages, you will find the 2024 *CropLife 100* company rankings, charts on some of the survey's key findings, and a detailed analysis of a few major crop input/service areas.

However, according to the 2024 *CropLife 100* survey, labor concerns now rank second among key challenges, cited by only 26% of respondents. Instead, 54% of the nation's top ag retailers now say price volatility — from lower commodity prices to higher interest rates to higher crop inputs costs — is their chief concern for the 2025 growing season.

“The combined factors of rising costs, supply chain volatility, and growing demand for technology innovations are shaping a tough environment for ag retailers,” wrote Jamie Scanlon, Head of Customer Experience at Simplot Grower Solutions, on the company's *CropLife 100* form.

Ernie Roncoroni, President/CEO at Grow West, agreed with this assessment. “Stress at the grower level is unprecedented,” wrote Roncoroni on his company's survey form. “Low commodity prices, lack of demand, high cost of doing business, liquidity issues, and regulations are all impacting growers.”

All Categories Suffer

To appreciate just how deep this revenue decrease ran for the nation's top ag retailers, consider the performances of the four major crop inputs/services categories – fertilizer, crop protection products, seed, and custom application — for 2024. In a typical year, one or two of the four categories will see some sales gains; the rest will not. This was certainly true in 2023, when three of the four categories saw revenue increases from the year before.

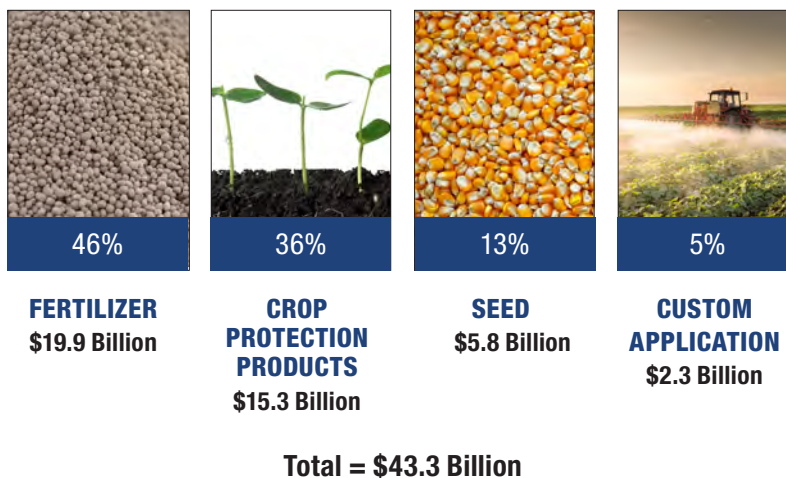
However, 2024 will go down as an exception to this rule. According to data collected in the 2024 *CropLife 100* survey, three of the four categories experienced sales declines for the year. The only one not to was the seed category. Here, overall revenues in 2024 were essentially flat year-over-year at \$5.8 billion. Despite this, seed was still able to increase its market share among all crop inputs/services, however, up 1% to 13%.

For the other three categories, the tally for the year was in levels of loss vs. 2023. For instance, the crop

All Categories Were Down

Among the four crop inputs/services categories, all saw lower revenues than in 2023, with fertilizer performing the worst during 2024, losing \$2.5 billion in value.

Categories by Sales/Market Share (In Billions)

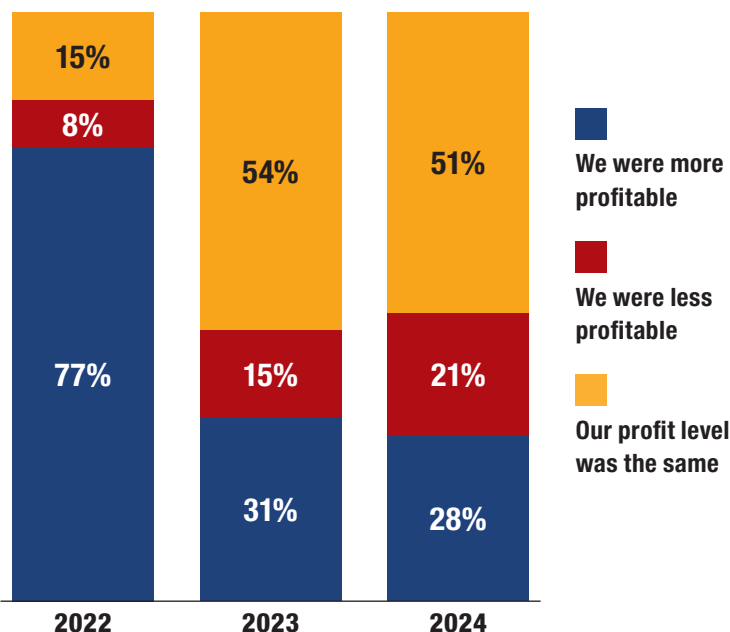


Base = 86 | Source: 2024 *CropLife 100* Survey

Profit Levels Flat

During 2024, most ag retailers saw the same profit levels as in 2023.

Level of Profitability among *CropLife 100* Retailers



Base = 95 | Source: 2024 *CropLife 100* Survey

protection products category saw its overall revenue among *CropLife 100* ag retailers decline \$400 million, from \$15.7 billion in 2023 to \$15.3 billion this year. Like seed, however, the category did manage to regain some market share compared with the other crop inputs/services tracked within the *CropLife 100*. Overall, the crop protection products category now accounts for 36% share of all crop inputs/services, an increase of 2% from 2023.

For the remaining two categories — custom application and fertilizer — 2024 represented declines across the sales range, from actual revenues to market share. For the smallest category, custom application, 2024 was an off year. Overall, according to the survey data, revenues in this category dropped \$500 million, from \$2.8 billion in 2023 to \$2.3 billion this year. Market share for this category also was down, off 1% from 6% in 2023 to 5%.

However, for custom application, virtually all of this revenue decline stemmed from the fact that the



category includes ag technology products within its overall numbers. These were off significantly from 2023 due to a variety of factors. (For more details on the performance of ag technology, see p. 32.)

But the biggest loser in terms of revenues/market share was the largest category, fertilizer. Not too many years ago, the fertilizer category represented more than half

of all crop inputs/services (51%, to be exact) sold for *CropLife 100* ag retailers on an annual basis. For the past few years, however, sales for this category have steadily dropped.

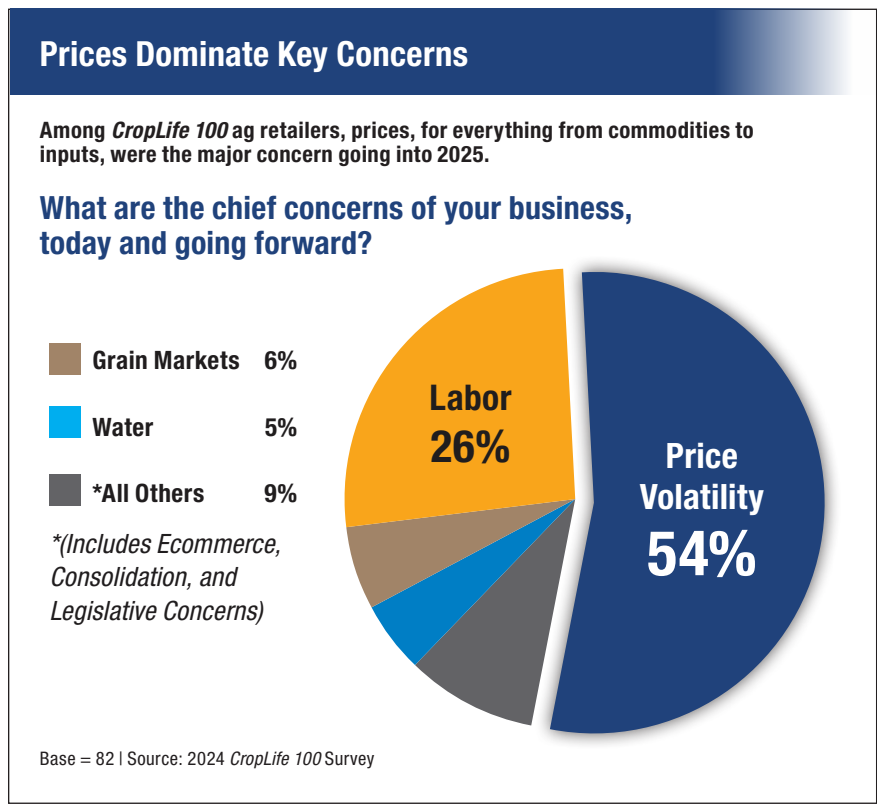
In 2024, this decline accelerated quite a bit. According to the 2024 *CropLife 100* survey, the fertilizer category had sales of \$19.9 billion this year, down \$2.5 billion from the 2023 total of \$22.4 billion. As a result of this loss, market share for the category fell even further back, down from 48% in 2023 to 46% this year. This is essentially the same market share the fertilizer category held back at the start of the 2020s.

The Smaller, the Better

Even with all these poor numbers, the 2024 *CropLife 100* survey of the nation's top ag retailers did provide some positive news. Indeed, for this year's growing season, it seems that the smaller the segment, the better it performed.

Each year, *CropLife* tracks the sales performances of 10 different sub-segments of the ag retail business. On the survey, we asked respondents to tell us if their sales for each of these sub-segments have grown, declined, or stay flat year-over-year. And in 2024, three of the smaller segments lead the industry in overall growth.

Coming in best for the 2024 growing season was biologicals. According to the nation's top ag





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retailers, 63% saw their revenues in this segment improve by between 1% and more than 5% for the year. Another 27% had flat biologicals sales, with 10% recording sales declines.

Two other sub-segments that performed well in 2024 were adjuvants and micronutrients. For these sub-segments, 58% and 53% of *CropLife 100* members, respectively, recorded revenue gains of between 1% and more than 5%. The other two sub-segments to see more than half of respondents increase their revenues were custom application and seed treatments (both at 52%).

Given all the negative numbers floating around from the 2024 *CropLife 100* survey, the nation's top ag retailers say that their grower-customers are still expecting the 2025 growing season to be a bit better in terms of overall performance. In the survey, *CropLife* asks respondents to tell us how their grower-customers would rate the prospects for the upcoming year on a scale of one to 10 — one being extremely bad to 10 being extremely good, with varying degrees of bad and good mixed in-between.

Biologicals, Adjuvants, and Micronutrients as Top Sales Gainers

Among the sub-segments in 2024, biologicals, adjuvants, and micronutrients had the largest revenues gains.

Segment	Sales Up 1% to 5%	Sales Flat	Sales Down 1% to 5%
Biologicals	63%	27%	10%
Adjuvants	58%	22%	20%
Micronutrients	53%	13%	34%
Custom Application	52%	34%	14%
Seed Treatment	52%	41%	7%
Precision Agriculture	46%	42%	12%
Crop Protection Products	43%	10%	47%
Fertilizer	42%	7%	51%
Biotech Seed	37%	47%	16%
Traditional Seed	14%	73%	13%

Base = 96 | Source: 2024 *CropLife 100* survey

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According to the 2024 *CropLife 100* survey, 11% of the nation's top ag retailers say their grower-customers are preparing for a rough economic season next year, rating the year between a one and a four. However, the other 89% foresee more positive results for 2025.

Based upon the survey data, the vast majority of *CropLife 100* ag retail grower-customers believe the 2025 growing season will rate between a five and a seven on the 10-point scale — pretty positive given how things played out during 2024. Better still, 31% of respondents say their grower-customers believe the 2025 growing season will rate between an eight and 10 in terms of profitability.

This would seem to bode well for the agricultural marketplace come next year. As always, time will tell. ▸

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24 TON 2-C STAINLESS STEEL TENDER



24 TON 3-C TENDER

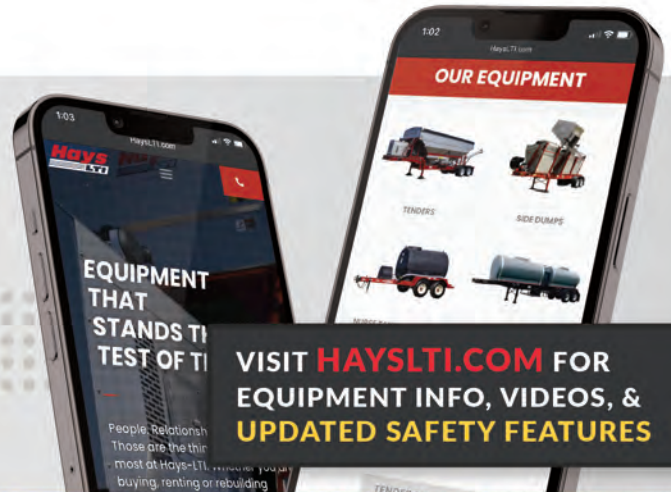


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CropLife 100

2024 Company Rankings

About the Research

COMPANIES INCLUDED in the 2024 *CropLife 100* listings were limited to independent dealerships and cooperatives that offer fertilizer, crop protection products, seed, and custom ap-

plication services. The figures do not include a host of services, such as data management, consulting/scouting, or grain elevator revenue. Dealerships and cooperatives are ranked in order by total sales

in their respective sales groups.

Errors or omissions? Think your company should be included on the list? Please email us at erics@croplife.com to let us know.

Look for our TOP 10 lists on page 26.

Greater than \$1 Billion IN RETAIL SALES

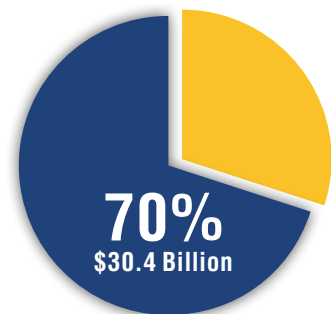
Rank/Company	Headquarters Location	# States Served	# Retail Outlets	Years in <i>CropLife 100</i>	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales
1 Nutrien Ag Solutions	Loveland, CO	45	1,500	41	41%	41%	14%	4%
2 Helena Agri-Enterprises	Collierville, TN	48	473	40	40%	41%	16%	3%
3 GROWMARK	Bloomington, IL	21	600	38	27%	45%	16%	12%
4 Simplot Growers Solutions	Boise, ID	32	244	40	40%	45%	13%	2%
5 CHS	Inver Grove Heights, MN	15	267	38	23%	58%	14%	5%
6 GreenPoint AG	Decatur, AL	10	78	7	27%	49%	22%	2%
7 Wilbur-Ellis	Denver, CO	19	151	39	48%	36%	12%	4%
8 Keystone Cooperative	Indianapolis, IN	3	163	25	25%	61%	9%	5%

COOPERATIVES: BLUE DEALERSHIPS: WHITE

GREATER THAN \$1 BILLION

Percentage of total *CropLife 100* Revenues

FACT: There was significant movement in this group during 2024. Two large Indiana-based cooperatives — Co-Alliance and Ceres Solutions — formally combined their businesses. This not only added a new member to the “Big Seven” ag retailers (now “Big Eight”) but boosted the overall market share of these top companies among all *CropLife 100* ag retailers by 3%, to 70%.



TOTAL GROUP SALES:
\$30.4 Billion

SHARE OF TOTAL *CROPLIFE 100* SALES:
70%

AVERAGE SALES PER RETAILER:
\$3.8 Billion

Total = \$43.3 Billion



\$201 Million to \$1 Billion IN RETAIL SALES

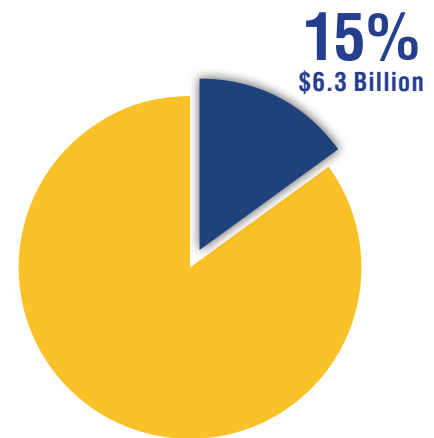
Rank/Company	Headquarters Location	# States Served	# Retail Outlets	Years in <i>CropLife 100</i>	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales
9 Agtegra Cooperative	Aberdeen, SD	2	65	34	23%	51%	18%	8%
10 MFA	Columbia, MO	4	151	32	20%	60%	14%	6%
11 NEW Cooperative	Fort Dodge, IA	2	88	15	25%	58%	13%	4%
12 Central Valley Ag Cooperative	York, NE	3	60	21	23%	63%	10%	4%
13 Valley Agronomics	Nampa, ID	6	37	13	33%	60%	4%	3%
14 Hefty Seed	Baltic, SD	10	49	23	66%	4%	30%	—
15 Aurora Cooperative	Aurora, NE	6	80	33	42%	44%	8%	6%
16 Effingham Equity	Effingham, IL	2	25	35	28%	51%	12%	9%
17 Sunrise Cooperative	Fremont, OH	1	26	8	26%	54%	12%	8%
18 Ag Partners Coop	Goodhue, MN	2	28	3	21%	56%	13%	10%
19 The McGregor Co.	Colfax, WA	3	38	41	46%	47%	5%	2%
20 United Cooperative	Beaver Dam, WI	1	17	16	23%	58%	17%	2%
21 Southern States Cooperative	Richmond, VA	7	82	34	21%	58%	16%	5%
22 Grow West	Woodland, CA	1	12	20	43%	56%	1%	—
23 Landus Cooperative	Des Moines, IA	2	50	8	30%	61%	4%	5%
24 Buttonwillow Warehouse	Bakersfield, CA	1	10	22	47%	49%	2%	2%

COOPERATIVES: BLUE DEALERSHIPS: WHITE

\$201 MILLION TO \$1 BILLION

Percentage of total *CropLife 100* Revenues

FACT: This block of *CropLife 100* ag retailers saw a big decline in overall revenue due to the merger of Co-Alliance and Ceres moving two companies out of the mix. However, since a few of the ag retailers just missed this sales range in 2024, a strong sales year could move one to three companies up come the 2025 *CropLife 100* rankings.



TOTAL GROUP SALES:
\$6.3 Billion

SHARE OF TOTAL *CROPLIFE 100* SALES:
15%

AVERAGE SALES PER RETAILER:
\$392 Million

Total = \$43.3 Billion

\$151 Million to \$200 Million IN RETAIL SALES

Rank/Company	Headquarters Location	# States Served	# Retail Outlets	Years in CropLife 100	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales
25 BRANDT	Springfield, IL	2	18	41	32%	41%	19%	8%
26 United Prairie	Tolono, IL	1	14	13	31%	51%	11%	7%
27 Mid Kansas Cooperative	Moundridge, KS	4	60	16	23%	54%	15%	8%
28 Twin State	Davenport, IA	2	14	38	27%	61%	5%	7%
29 Frontier Cooperative	Lincoln, NE	1	60	21	22%	58%	14%	6%
30 Premier Companies	Seymour, IN	4	12	6	26%	55%	14%	5%
31 Mid Valley Agricultural Services	Oakdale, CA	1	7	36	47%	52%	1%	—
32 Central Farm Service	Truman, MN	2	32	23	24%	60%	9%	7%
33 River Valley Cooperative	Elkridge, IA	2	33	11	24%	61%	10%	5%
34 G.S. Long	Union Gap, WA	2	4	33	72%	27%	1%	—

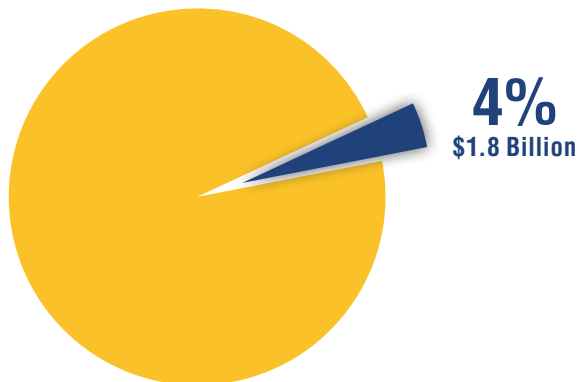
COOPERATIVES: BLUE DEALERSHIPS: WHITE

25



\$151 MILLION TO \$200 MILLION
Percentage of total *CropLife 100* Revenues

FACT: This group of ag retailers used to be the largest not too many years ago. In 2024, only 10 members remain as company mergers and depressed sales moved ag retailers up or down the overall rankings. In 2025, a few companies at the top of this group are poised to move up the rankings, which will further reduce the number of ag retailers that fit into this sales range.



TOTAL GROUP SALES:
\$1.8 Billion

SHARE OF TOTAL CROPLIFE 100 SALES:
4%

AVERAGE SALES PER RETAILER:
\$180 Million

Total = \$43.3 Billion

\$101 Million to \$150 Million IN RETAIL SALES

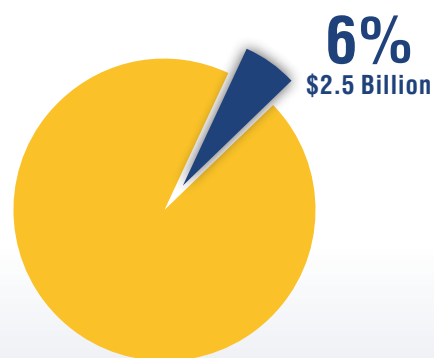
Rank/Company	Headquarters Location	# States Served	# Retail Outlets	Years in <i>CropLife 100</i>	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales	
35	Frenchman Valley Farmers Coop	Imperial, NE	2	6	33	28%	62%	3%	7%
36	Alcivia Cooperative	Cottage Grove, WI	1	21	23	18%	64%	12%	6%
37	Titan Pro	Clear Lake, IA	8	139	7	94%	1%	5%	—
38	AgState	Cherokee, IA	1	40	18	26%	57%	16%	1%
39	The Andersons	Maumee, OH	3	10	28	23%	65%	4%	8%
40	Fertizona	Casa Grande, AZ	2	10	36	34%	55%	11%	—
41	Asmus Farm Supply	Rake, IA	2	5	22	83%	11%	5%	1%
42	Diamond R. Fertilizer	Fort Pierce, FL	1	6	39	41%	56%	3%	—
43	Star of the West Milling	Frankenmuth, MI	6	33	31	19%	55%	17%	9%
44	Kova Fertilizer	Greensberg, IN	1	12	41	28%	63%	3%	6%
45	Heartland Co-op	West Des Moines, IA	3	75	28	23%	59%	10%	8%
46	Cooperative Farmers Elevator	Rock Valley, IA	3	25	9	29%	54%	15%	2%
47	Heritage Cooperative	Delaware, OH	1	17	9	21%	56%	15%	8%
48	Country Visions Coop	Brillion, WI	1	10	10	17%	56%	18%	9%
49	Novus Ag	Fort Collins, CO	4	15	9	32%	48%	12%	8%
50	CPI	Hastings, NE	1	25	15	21%	71%	4%	4%
51	Superior Ag	Huntingburg, IN	1	22	3	24%	61%	10%	5%
52	Crystal Valley Cooperative	Mankato, MN	2	16	5	21%	55%	15%	9%
53	Land View Fertilizer	Rupert, ID	3	9	31	30%	64%	5%	1%
54	Country Partners Cooperative	Gothenburg, NE	1	20	1	21%	71%	4%	4%

COOPERATIVES: BLUE DEALERSHIPS: WHITE

\$101 MILLION TO \$150 MILLION

Percentage of total *CropLife 100* Revenues

FACT: This group saw a jump in overall market share among *CropLife 100* ag retailers, up from 5% in 2023 to 6% this year. Now containing 20 members (tied for the largest group among *CropLife 100* ag retailers), this could easily become the industry's largest sales block in 2025 with the addition of a few companies that just missed this sales range during the 2024 growing season.



TOTAL GROUP SALES:
\$2.5 Billion

SHARE OF TOTAL *CROPLIFE 100* SALES:
6%

AVERAGE SALES PER RETAILER:
\$126.4 Million

Total = \$43.3 Billion

\$51 Million to \$100 Million IN RETAIL SALES

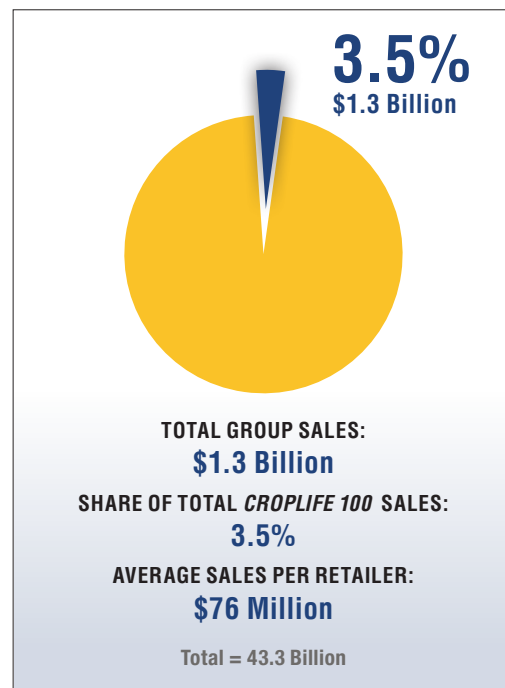
Rank/Company	Headquarters Location	# States Served	# Retail Outlets	Years in <i>CropLife 100</i>	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales	
55	Carolina Eastern-Vail	Salem, NY	7	8	35	17%	64%	12%	7%
56	Farm Service Co-op	Harlan, IA	1	8	27	20%	65%	7%	8%
57	AgriPartners	Clear Lake, SD	3	4	7	43%	13%	43%	1%
58	The Dune Companies	Yuma, AZ	2	3	37	37%	59%	—	4%
59	Valley United Co-op	Reynolds, ND	2	9	17	35%	44%	17%	4%
60	Howard Fertilizer & Chemical	Orlando, FL	2	7	6	18%	82%	—	—
61	Willard Agri-Service	Frederick, MD	3	4	41	13%	81%	—	6%
62	The DeLong Co.	Clinton, WI	2	9	41	16%	53%	24%	7%
63	Cooperative Elevator Co.	Pigeon, MI	2	13	34	26%	50%	19%	5%
64	GAR Bennett	Reedley, CA	1	1	28	58%	42%	—	—
65	AgRx	Oxnard, CA	1	5	28	37%	56%	—	7%
66	Butte County Rice Growers	Richvale, CA	1	3	31	58%	41%	1%	—
67	Pratum Co-op	Salem, OR	1	4	6	44%	50%	3%	3%
68	Five Star Cooperative	New Hampton, IA	1	18	1	27%	54%	13%	6%
69	Mountain View Co-op	Black Eagle, MT	1	26	21	36%	56%	4%	4%
70	Mercer Landmark	Celina, OH	1	20	2	26%	62%	7%	5%
71	American Plains Coop	Great Bend, KS	2	23	21	36%	48%	10%	6%
72	Marion Ag Services	St. Paul, OR	1	1	7	10%	80%	1%	9%
73	Pearl City Elevator	Lena, IL	2	8	13	23%	62%	8%	7%
74	Eldon C. Stutsman	Hills, IA	1	4	41	19%	74%	2%	5%

COOPERATIVES: BLUE DEALERSHIPS: WHITE

\$51 MILLION TO \$100 MILLION

Percentage of total *CropLife 100* Revenues

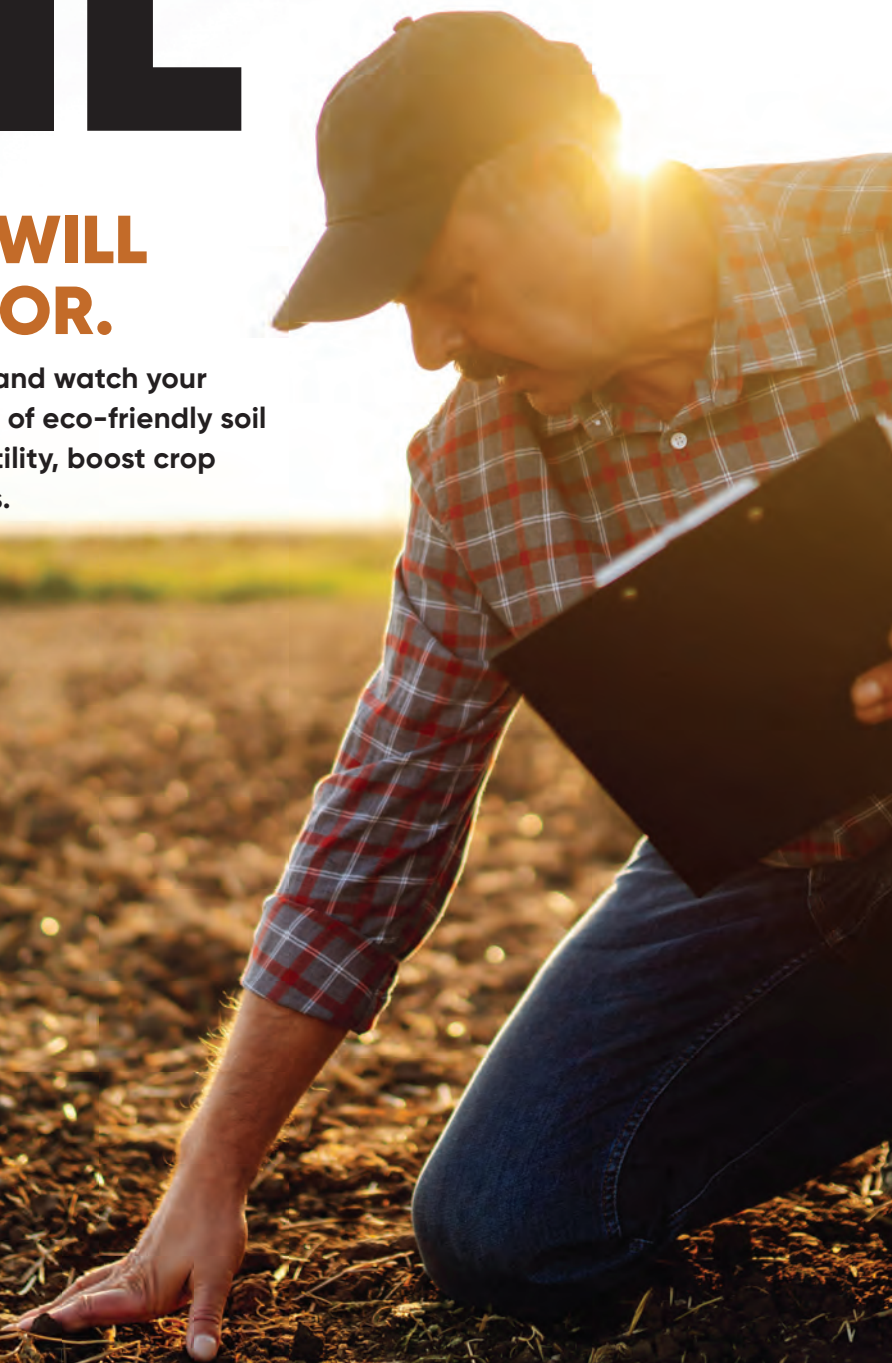
FACT: Tied for the largest sales block among *CropLife 100* ag retailers in 2024 with 20 members, the companies in this group are located across the entire U.S. — from New York to California and everywhere in between. In 2025, expect a few companies that fell out of this sales group in 2024 to return, making it the largest block of ag retailers within the *CropLife 100*.



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\$25 Million to \$50 Million IN RETAIL SALES

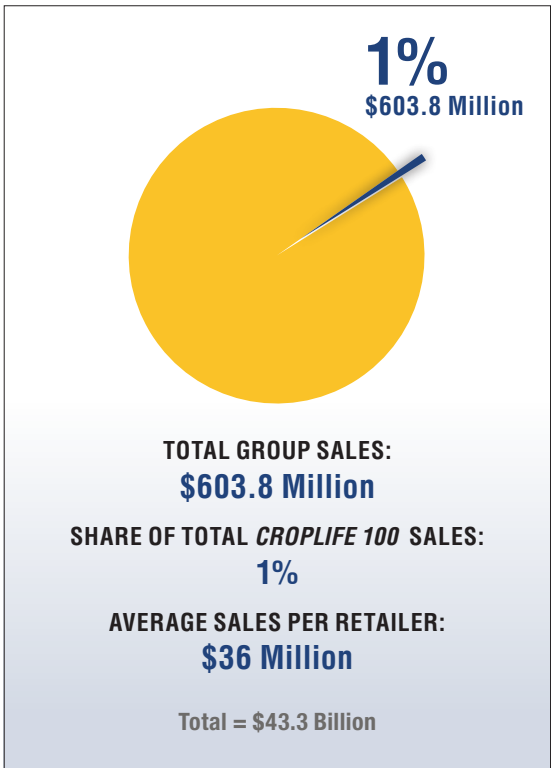
Rank/Company	Headquarters Location	# States Served	# Retail Outlets	Years in CropLife 100	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales	
75	Ricketts Farm Service	Salisbury, MO	1	7	5	36%	38%	10%	16%
76	Short Lane Ag Supply	Colby, WI	1	3	11	59%	23%	16%	2%
77	LMG Ag Products	Visalla, CA	1	1	1	87%	13%	—	—
78	Sims Fertilizer & Chemical	Osborne, KS	1	1	30	95%	2%	1%	2%
79	Griffin Fertilizer	Frostproof, FL	1	3	41	30%	70%	—	—
80	Farm Service Inc.	Walnut Ridge, AR	1	7	32	25%	56%	11%	8%
81	B and D Chemical	Cullom, IL	1	1	5	80%	17%	—	3%
82	Top Ag Coop	Okawville, IL	1	11	4	32%	45%	15%	8%
83	Legacy Cooperative	Scottsbluff, NE	1	12	28	39%	45%	11%	5%
84	The Mill	White Hall, MD	1	3	6	16%	72%	8%	4%
85	El Dorado Ag Products	Elkhart, TX	1	6	39	1%	97%	1%	1%
86	Delta Growers	Charleston, MO	1	3	32	26%	50%	18%	6%
87	TH Agri-Chemicals	Plainfield, WI	2	2	35	92%	7%	—	1%
88	Midwestern BioAg	Blue Mounds, WI	6	7	8	—	94%	3%	3%
89	Rockwood Ag Services	Brawley, CA	2	3	3	62%	35%	2%	1%
90	Valley Ag Supply	Gayville, SD	1	2	9	31%	53%	8%	8%
91	Burnt Prairie Fertilizer	Burnt Prairie, IL	1	1	4	36%	36%	22%	6%

COOPERATIVES: BLUE DEALERSHIPS: WHITE

\$25 MILLION TO \$50 MILLION

Percentage of total CropLife 100 Revenues

FACT: This group did see plenty of positives in 2024, with overall revenues increasing from \$585.6 million in 2023 to \$603.8 million this year. Better still, the average sales per retailer here improved slightly, up almost \$200,000 from 2023.



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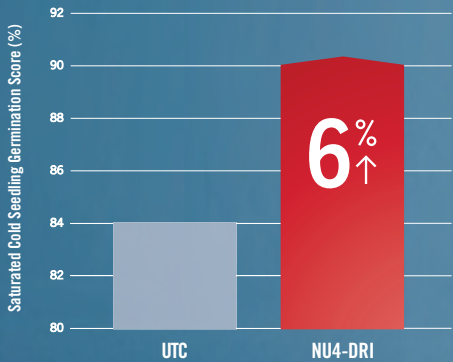
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*The underlying data was provided by SGS North America under a Research Trial Financial Support Agreements with Koch Agronomic Services, LLC. Neither the universities, institutions, nor the individual researchers referenced, endorse or recommend any product or service. Improvements in yield and nutrient use efficiency may not be observed in all cases.



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Less than \$25 Million IN RETAIL SALES

Rank/Company	Headquarters Location	# States Served	# Retail Outlets	Years in <i>CropLife 100</i>	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales	
92	Smith Fertilizer & Grain	Knoxville, IA	1	8	10	11%	38%	8%	43%
93	Jay-Mar	Plover, WI	1	1	39	8%	83%	7%	2%
94	O'Toole Companies	Letts, IA	1	3	2	36%	43%	8%	13%
95	Baltz Feed	Pocahontas, AR	2	3	19	29%	57%	9%	5%
96	Valley Farmers Supply	Worden, MT	1	4	5	37%	53%	6%	4%
97	New Ag Services	Hortonville, WI	1	2	3	18%	63%	12%	7%
98	BEI Hawaii	Honolulu, HI	1	6	19	5%	95%	—	—
99	Foster-Gardner	Coachalla, CA	1	1	30	45%	55%	—	—
100	Warner Fertilizer	Somerset, KY	1	11	40	8%	80%	9%	3%

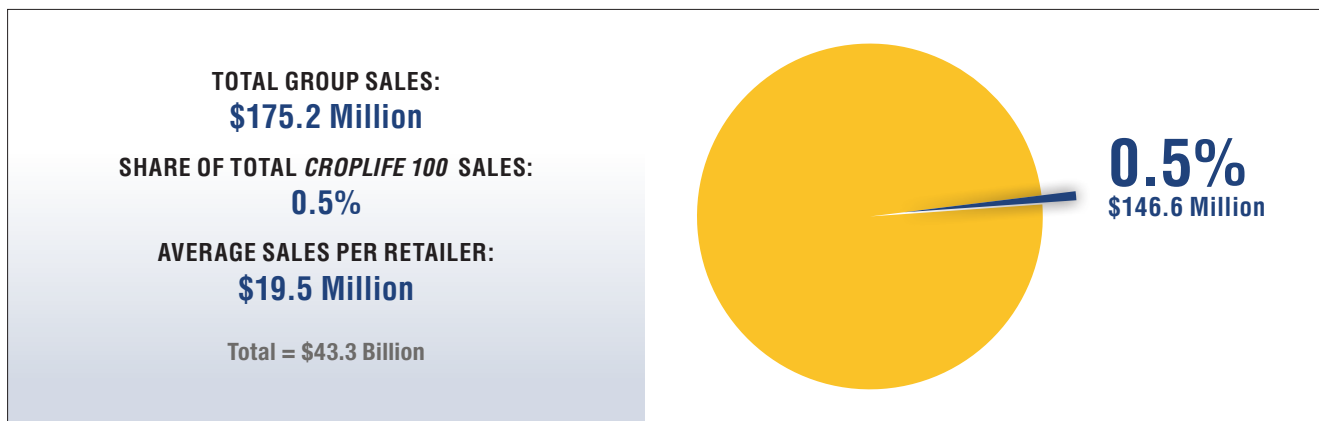
COOPERATIVES: BLUE DEALERSHIPS: WHITE

LESS THAN \$25 MILLION

Percentage of total *CropLife 100* Revenues

FACT: After the \$1 billion club, this group now represents the smallest part of the *CropLife 100* with only nine members. Overall sales for these ag retailers did increase during 2024, however, up more than \$1 million per company to \$19.5 million. And

although small, this group shows no signs of disappearing from the *CropLife 100* rankings due to the fact many newer companies first enter the listings in this group before expanding their market presence/share.



To learn more about the U.S. ag retailers who compile this year's *CropLife 100* list, visit CropLife.com/top100

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The 'Big 4' Top 10

TOP 10 Fertilizer

Total Sales/Top 10: **\$14 billion**
Share of Total *CropLife 100* Fertilizer Sales: **70%**

- 1 Nutrien Ag Solutions
- 2 Helena Agri-Enterprises
- 3 GROWMARK
- 4 Simplot
- 5 CHS
- 6 Keystone Cooperative
- 7 GreenPoint Ag
- 8 Wilbur-Ellis
- 9 MFA
- 10 Central Valley Ag

TOP 10 Crop Protection Products

Total Sales/Top 10: **\$11.3 billion**
Share of Total *CropLife 100* Crop Protection Product Sales: **74%**

- 1 Nutrien Ag Solutions
- 2 Helena Agri-Enterprises
- 3 Simplot
- 4 GROWMARK
- 5 Wilbur-Ellis
- 6 GreenPoint Ag
- 7 Hefty Seed
- 8 Keystone Cooperative
- 9 CHS
- 10 Agtegra

TOP 10 Seed

Total Sales/Top 10: **\$4.6 billion**
Share of Total *CropLife 100* Seed Sales: **81%**

- 1 Nutrien Ag Solutions
- 2 Helena Agri-Enterprises
- 3 GROWMARK
- 4 Simplot
- 5 GreenPoint Ag
- 6 CHS
- 7 Wilbur-Ellis
- 8 Hefty Seed
- 9 Keystone Cooperative
- 10 Agtegra

TOP 10 Custom Application

Total Sales/Top 10: **\$1.4 billion**
Share of Total *CropLife 100* Custom Application Sales: **76%**

- 1 Nutrien Ag Solutions
- 2 GROWMARK
- 3 Helena Agri-Enterprises
- 4 Simplot
- 5 CHS
- 6 Keystone Cooperative
- 7 Wilbur-Ellis
- 8 Agtegra
- 9 MFA
- 10 NEW Cooperative

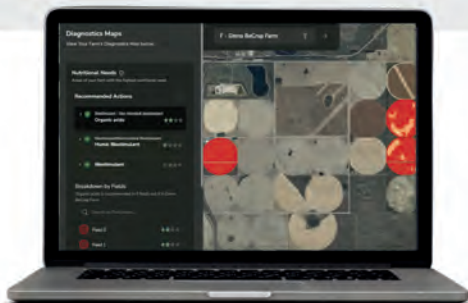
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Although the Big Three self-propelled sprayer manufacturers still dominate the marketplace, smaller players did make some gains this past year.

Sprayer Fleets Diversified in 2024

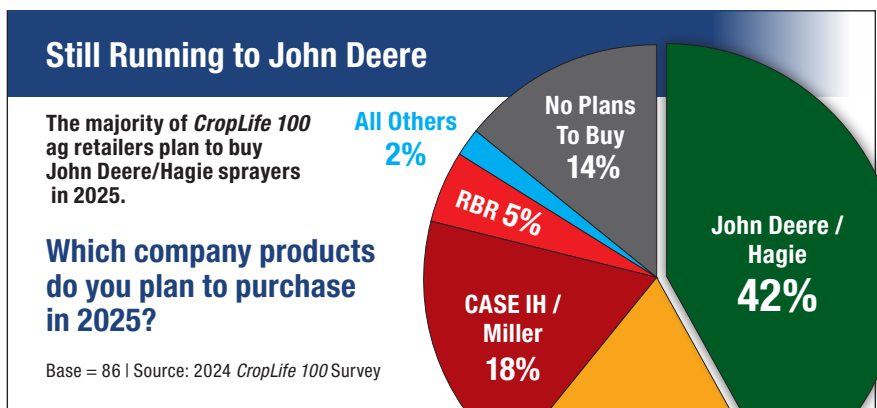
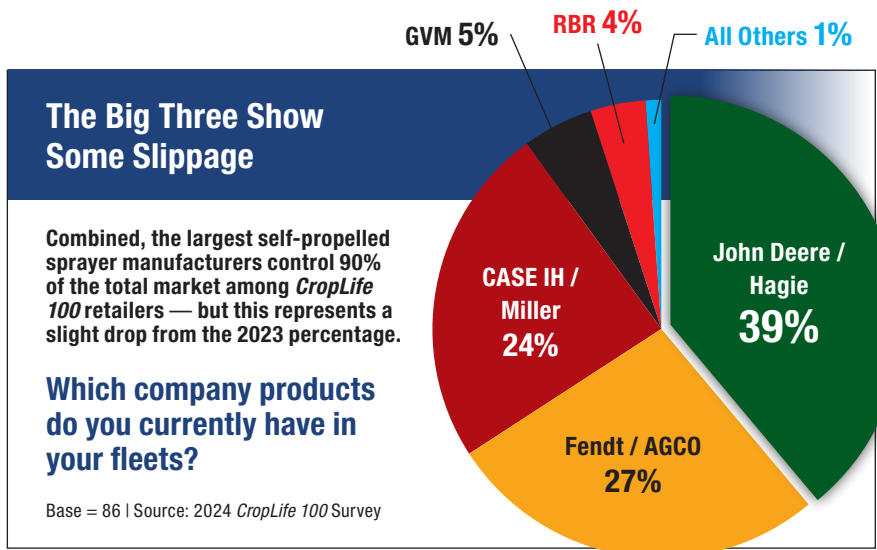
BY ERIC SFILIGOJ
EDITOR

BY MOST ACCOUNTS, the 2024 growing season was less than stellar for the nation's self-propelled equipment manufacturers. Among the major players in particular — John Deere, Fendt/AGCO, and Case IH/Miller/New Holland — sales started out the year slow and remained that way for the majority of the calendar. Indeed, during the fall months, with quarterly sales dropping at most companies, rounds of worker layoffs dominated the news for these equipment makers.

And in one sense, this market sluggishness in new self-propelled sprayer demand shouldn't have been a complete surprise. One year ago, when *CropLife*® magazine was compiling the data from its 2023 *CropLife 100* survey of the nation's top ag retailers, 16% of respondents indicated that, because of volatile agricultural market conditions, their companies planned to "sit out" the 2024 growing season when it came to purchasing new self-propelled sprayers for their fleets.

Despite this negative news, however, one of the Big Three sprayer manufacturers did have some good news to share during the 2024 calendar year, managing to grow its overall market share. According to the 2024 *CropLife 100* survey, 39% of the nation's top ag retailers with sprayer fleets own John Deere models. This represented a 1% increase from the findings of the 2023 *CropLife 100* survey, when this figure was 38%.

For the other two Big Three equipment makers, the 2024 news was more somber. Both Fendt/AGCO and Case IH/Miller/New Holland saw their market shares among *CropLife 100* ag



retailer fleets fall during the year. In Fendt/AGCO's case, this decline was 2%, from 29% in 2023 to 27%. For Case IH/Miller/New Holland, the drop was 1%, from 25% in 2023 to 24%.

Smaller Company Good News

Still, there was some good news for self-propelled sprayer manufacturers in 2024 — at least for those with smaller market footprints compared with the Big Three. For several years

now, the Big Three have steadily increased their overall market shares for self-propelled sprayers among the nation's top ag retailers. In fact, during the 2023 growing season, the combined market share for John Deere, Fendt/AGCO, and Case IH/Miller/New Holland topped 92%. Much of this growth came at

the expense of smaller self-propelled sprayers makers.

But according to the data from the 2024 *CropLife 100* survey, smaller self-propelled sprayer manufacturers managed to make some market share gains from the Big Three among the nation's top ag retailers. Based upon the results, these smaller players hold an overall 10% market share among *CropLife 100* sprayer fleets, an improvement of 2% from the 2023 figure.

Of particular note was the performance of RBR Enterprise. According to 2024 *CropLife 100* survey, the Byhalia, MS-based sprayer/spreader manufacturer grew its overall market share of *CropLife 100* ag retailers' self-propelled sprayer fleets from 1% to 4%.

"Being a mid-sized company, we are able to support our customer base," said Jason Eaton, COO at RBR, during a recent interview with *CropLife*.

Future Purchases

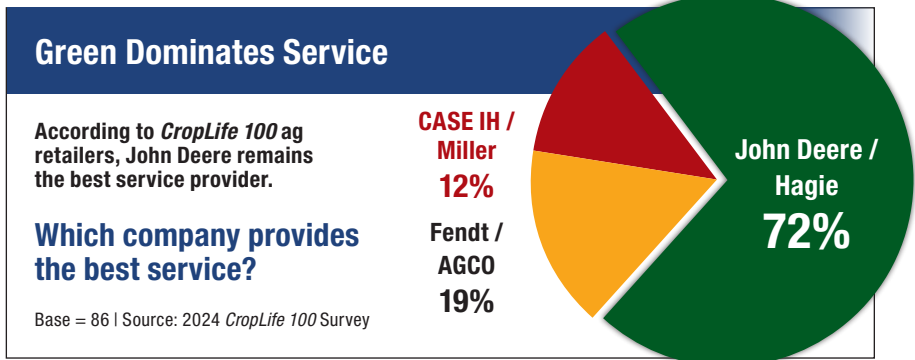
Even better news for smaller equipment manufacturers such as RBR came from the question of which self-propelled sprayer manufacturers *CropLife 100* ag

retailers plan to buy products from during the 2025 growing season. According to the 2024 survey, 5% plan to look specifically to RBR for additions to their fleets next year. Another 2% plan to buy sprayers from such companies as GVM, Horsch, and Oxbo.

Among the Big Three players, a majority of respondents to the 2024 *CropLife 100* survey (42%) say they plan to make sprayer purchases from John Deere. For Fendt/AGCO, the percentage of the nation's top ag retailers planning to buy their models stands at 19%. Case IH/Miller/New Holland buyers are slightly behind this mark going into the 2025 growing season, with 18% of ag retailers

planning to buy self-propelled sprayers from these companies.

Perhaps most importantly, the number of the nation's top ag retailers that are planning to not make any self-propelled sprayers purchases in 2025 is falling. As we pointed out earlier in this article, the 2023 *CropLife 100* survey had 16% of respondents not planning to buy any new spraying going into the 2024 growing season. However, according to the 2024 *CropLife* survey data, this percentage will fall to 14% for the upcoming year. For ag equipment makers looking for some sales figures rebound during 2025, this 2% drop among non-buyers should represent some welcome news indeed.



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In 2024, Technology Experiences a ‘Pause’

With overall sales down, can ag technology recover in 2025?

BY ERIC SFILIGOJ
EDITOR

EVERY YEAR WHEN *CROPLIFE*® MAGAZINE compiles the results from its annual *CropLife 100* survey of the nation’s top ag retailers, there is always at least one big surprise in the numbers. For the past few years, this “survey surprise” has tended to be positive. For instance, in 2022, 99 out of the *CropLife 100* ag retailers reported year-over-year revenue growth from the year before. In 2023, the seed category saw its overall sales rebound following several years of declines.

In the 2024 *CropLife 100* survey, however, the news was of a negative variety. For evidence, consider the tale of the ag technology sector.

Now throughout the past two growing seasons, there has been plenty of marketplace “buzz” regarding ag tech-

nology. In mid-2023, as the Federal Aviation Administration released new guidelines for operation, application drone activity among ag retailers has steadily increased. Furthermore, major equipment manufacturers such as John Deere, Raven Industries, and Fendt/AGCO has dabbled in all sorts of new high-tech product launches. These have included numerous systems featuring autonomous operations or powered by advanced artificial intelligence (AI). Indeed, many of these products have been on display at dozens of the ag equipment industry’s biggest winter and summer trade shows, including the National Farm Machinery Show, Farm Progress, the Midwest AG Industries Exposition (MAGIE).

Depressed Revenues

However, despite all this activity in the ag technology sector, sales for

these products among the nation’s top ag retailers have not grown. Quite the opposite, in fact.

According to data collected in the 2024 *CropLife 100* survey, ag technology product sales this year topped only \$338.1 million. This represented a surprising 59% decline from the sales figure ag technology products recorded during the 2023 growing season, when the sector topped \$815 million.

So, what happened? According to survey respondents, two explanations come to mind. The first ties back to grower-customer revenues. Based upon data from the USDA, net farm income was expected to decline for 2024, down 4.4% vs. 2023 to \$140 billion. Many market watchers say that whenever farmer incomes drop, “ag technology purchases are the first things cut.”

The second explanation is a little less bleak and has to do with more semantics than sales figures. Since many of the newest ag technologies are for application work, a portion of the nation’s ag retailers have included these sales into their custom application revenues. In fact, at least one dozen *CropLife 100* ag retailers noted this bookkeeping position on their 2024 survey forms. So ag technology sales may be stronger than the overall numbers show for this year’s growing season.

Can the ag technology sector recover some in 2025? According to the nation’s top ag retailers, the outlook isn’t that bright. Based upon the survey results, only 9% of respondents see ag technology adoption next year being “huge.” Another 36% believe growth in this sector will remain “small.” The vast majority, 55%, think “it’s too early to tell” how the ag technology sector will perform in 2025.

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FROM FIELD TO FINANCE

Why Digital Lending is the Future of Agriculture

Photo: AREE / stock.adobe.com

Agriculture has long been rooted in personal relationships, with financial interactions between farmers and lenders often taking place face-to-face. Yet, in recent years, the ag finance industry has gradually embraced digital solutions, recognizing the need for more flexibility, convenience, and efficiency for farmers. This shift is not about replacing traditional relationships but rather enhancing them through digital accessibility.

Balancing Relationships

As the ag finance sector evolves, it is becoming a hybrid model where relationship-based interactions coexist with digital services. Many farmers still value the personal touch and trust that comes from long-standing connections with their lenders.

"It's digital and relationship-based," explains Kelly Miller, Director Of Ag Tech for Compeer Financial. "If our clients want to do business digitally, we want to make sure they have that choice."

Digital financing allows these relationships to adapt to a more modern format. Clients can choose between in-person or digital interactions based on their needs. This approach respects the tradition of relationship-based lending while acknowledging the growing need for digital convenience.

Why Agriculture is Moving Toward Digital Financing

The demand for digital financing options in agriculture is primarily driven by farmers' changing expectations. Today's farmers expect their financial partners to be available when and where they need them,

whether early in the morning, late at night, or during downtime on a rainy day.

"We want to make sure that we're available 24/7. It's not just 8:00 to 5:00," says Miller. "It's whenever farmers have time to do business. So, it's really on their own terms."

Digital financing provides that flexibility, enabling farmers to conduct business on their own schedules rather than being restricted to standard business hours.

Additionally, as digital solutions have become more integrated into the consumer world, with options like Apple Pay and Venmo, farmers now expect similar ease of use in the financial interactions for their farming operation. Offering digital tools ensures that agricultural lenders meet these expectations, allowing clients to access and manage funds seamlessly.

The Benefits of Digital Financing

- 1. Availability 24/7:** One of the most significant advantages of digital financing is that it is accessible anytime. This allows farmers to apply for loans, make payments, or check their accounts whenever they find it convenient. This flexibility is especially valuable in agriculture, where the weather and crop cycles often dictate the work schedule.
- 2. Reduced Need for Travel:** Digital financing reduces the need for farmers to travel to a lender's office, a benefit for those in remote areas or those with demanding schedules. Instead, they can complete transactions from their home or field, saving time and money.
- 3. Efficiency in Financial Management:** Through digital solutions, farmers



can quickly and efficiently handle various financial tasks—from securing a loan to managing repayments. This level of efficiency allows them to focus on their farming operation.

4. Streamlined Transactions at Points of Sale: Many ag financing providers are partnering with local ag entities such as retailers and co-ops. This collaborative approach ensures that farmers can obtain the financial support they need at critical points in their operation, fostering a seamless experience.

“The closer we are to these points of sale, the more successful we’re going to be,” shares Miller. “Partnerships are key to making digital financing work in a way that’s convenient for our clients.”

The Future of Digital Financing

The trend toward digital financing in agriculture is expected to grow as more farmers adopt and trust these solutions. In recent years, many growers have moved beyond initial pilot transactions to more substantial loans, recognizing the value and reliability of digital services.

“From the first to the fourth year, we’ve seen steady growth in digital financing,” says Miller. “What we see is that

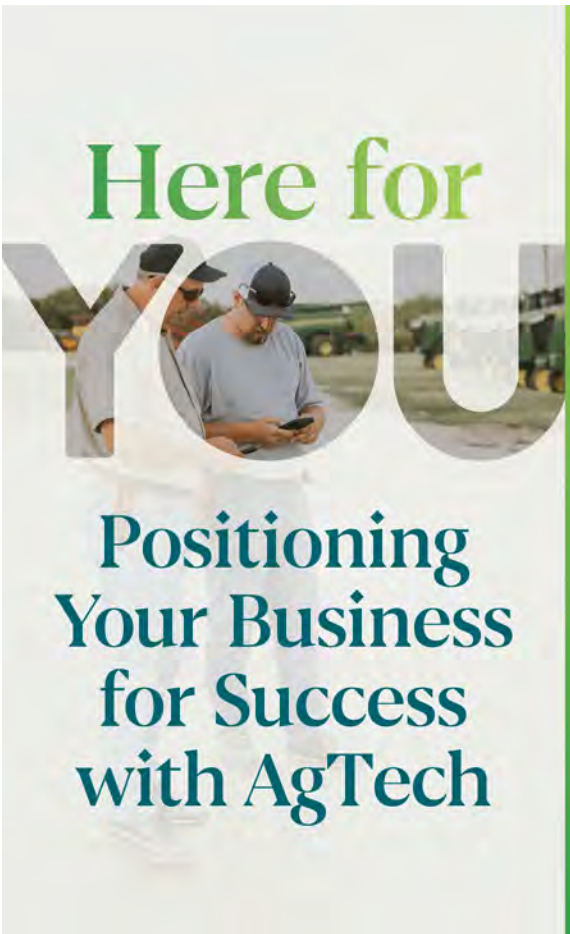
maybe in the first year, they tried with a small amount, but in the second year, they came back, and in the third year, they did more. It’s convenient. It works. And they trust it.”

Digital financing in agriculture provides flexibility, accessibility, and efficiency while preserving the traditional relationship-driven approach. By combining

“From the first to the fourth year, we’ve seen steady growth in digital financing. What we see is that maybe in the first year, they tried with a small amount, but in the second year, they came back, and in the third year, they did more. It’s convenient. It works. And they trust it.”

– KELLY MILLER, COMPEER FINANCIAL

digital tools with strong partnerships at local points of sale, ag lenders empower farmers to access the financial resources they need with minimal hassle. As the sector continues to evolve, digital financing promises to be a powerful tool that complements the personal relationships that remain at the heart of agriculture.



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A 'Good News/Bad News' Kind of Year for Crop Protection

Although crop protection product sales struggled overall during 2024, the category did grow its market share among crop inputs – and a pair of segments performed better than expected.

BY ERIC SFILIGOJ
EDITOR

THE CROP PROTECTION PRODUCTS CATEGORY had a really good year during the 2023 growing season. With the industry significantly recovered from the supply chain headaches of 2021 and 2022, overall revenues topped at almost \$16 billion. It seemed as if the category was poised for similar positive results during 2024.

“If you look back two to three years, the world was suffering from many historic events, such as COVID,” David Elser, Region Head, North America at UPL NA, Inc., told *CropLife*® magazine back during the 2024 Commodity Classic show in March. “This caused substantial supply chain disruptions. This made everyone in agriculture — from growers to suppliers to ag

retailers — to think about buying everything they needed to do business 15 to 18 months in advance, rather than just a few weeks forward.”

But this continued category growth didn't happen, unfortunately. According to the 2024 *CropLife 100* survey, the nation's top ag retailers experienced a 2.6% revenue decline during this calendar year with sales topping out at \$15.3 billion. According to most industry watchers, the very phenomenon Elser described — buying more products in advance, “just in case” — meant ag retailers and their grower-customers were well stocked on crop protection products for the current growing season.

However, all of the news for the crop protection products category wasn't bad in 2024. Because the category didn't decline as rapidly as other crop inputs/services catego-

ries among ag retailers, the overall market share did improve. For 2024, crop protection products now hold a 36% market share among *CropLife 100* ag retailers compared with other crop inputs such as fertilizer and seed. This represented a 2% improvement from the 34% market share the category held according to the 2023 *CropLife 100* survey.

Continued on p.38

Tempered Growth

The majority of ag retailers still saw growth in crop protection, but it wasn't as robust as in 2023.

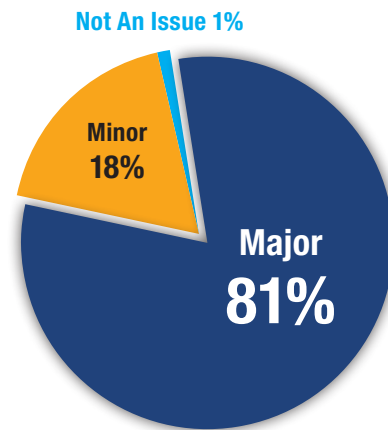
SEGMENT	UP	FLAT	DOWN
Herbicides	44%	15%	41%
Fungicides	45%	22%	33%
Insecticides	51%	26%	23%
Biologicals	63%	27%	10%

Base = 96 | Source: 2024 *CropLife 100* Survey

Resistant Weeds Pressures Lessons, Slightly

Compared with 2023, 2% fewer ag retailers said resistant weeds are a major problem for their customers.

How would you describe resistant weed pressures in your area?



Base = 95 | Source: 2024 *CropLife 100* Survey

Continued from p.36

Slower Growth in Herbicides, Fungicides

Among the four individual segments that make up the crop protection products category, all recorded higher sales volumes than flat or down revenues. However, compared with the percentages recorded for these segments during 2023 — when “up sales” percentages ranged between 57% and 75% — this year’s numbers were significantly lower.

For example, consider herbicides. In the 2023 *CropLife 100* survey, 65% of respondents said their sales in this segment grew between 1% and more than 5%. In 2024, only 44% of *CropLife 100* ag retailers reported these kinds of sales increases for their operations. An almost similar percentage — 41% — said their herbicide revenues in 2024 declined between 1% and more than 5%. The remaining 15% had flat sales in herbicides for the year.

Perhaps a drop in herbicide resistant weeds pressures also kept

this segment’s numbers from looking better in 2024. Based upon data from the 2024 *CropLife 100* survey, 77% of respondents described herbicide-resistant weeds as a “major problem” in their areas. This was a decline of 2% from the findings in the 2023 *CropLife 100* survey, however.

It was a similar story for another crop protection products segment, fungicides. In 2023, 57% of *CropLife 100* ag retailers said their sales in this segment grew between 1% and more than 5%. But according to the 2024 *CropLife 100* survey, this percentage was only 45% for this year’s growing season. Instead, 22% of respondents said their fungicides revenues were flat for 2024 and 33% reported sales declines between 1% and more than 5%.

Insecticides, Biologicals Lead the Way

On the plus side, the other two crop protection products segments did perform better for 2024. For instance,

in insecticides, slightly more than half of the nation’s top ag retailers — 51% — indicated that their revenues in this segment improved between 1% and more than 5% for the year. Twenty-six percent of survey respondents said their insecticide sales for this year were the same as during the 2023 growing season. The remaining 23% recorded sales declines of between 1% and more than 5% for their insecticide offerings in 2024.

The “revenue winner trophy” for 2024 among the crop protection product segments belonged to the newest one — biologicals. According to the 2024 *CropLife 100* survey, 63% of the nation’s top ag retailers saw sales increases between 1% and more than 5% for their biological offerings for grower-customers. Twenty-seven percent said their biologicals revenues for the year were flat compared with 2023. Significantly, only 10% of respondents said their biologicals sales actually declined between 1% and more than 5% for the year.



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STRATEGIC SOLUTION TO CAPTURING REVENUE GROWTH IN A DECLINING CUSTOMER MARKET

On average, ag retailers experience an annual 3 to 6% customer churn¹. That means more dollars are spent prospecting, sourcing additional products to sell, and using valuable salesperson time to counter the churn. This impact can be attributed to shifts in today's production agriculture industry.

According to the USDA's Economic Research Service, the number of farms in the U.S. saw a 7% decrease from the 2017 census. The number of acres per farm, not surprisingly, increased.

If the U.S. is experiencing fewer farmers and increased consolidation of acres farmed, this should force us to address how customer patterns will change. Whether it be economic pressures or generational transfers driving the consolidation of land, you will have less farmers to sell to, and each farmer will be more valuable to your business.

That means the focus must shift to customer loyalty for ag retail revenue growth to be achieved.

The strategic solution, commonly adopted by non-agriculture industries, all vying for share in their respective markets as well, lies in customer loyalty programs. According to Forbes, 90% of businesses in 2024 have some type of loyalty or rewards program.

Customer churn may be inevitable in business, but given the shrinking and consolidating nature of the agriculture industry, we cannot rely on acquiring new customers for growth as we once did. Instead, in a declining market, the critical goal is to maximize the revenue and wallet share of existing customers.

You might say, "We already offer everything we can to gain that potential revenue!" The problem likely not in your service or product offerings, but rather in increasing your share of the farmer's wallet. If you have, on average, 50% of your farmers' input purchase spend each year, but the number of farmers is declining, you now need to acquire 60%, 75%, or even 80% and higher to counter a diminishing customer base.

While quality service, no doubt, is important to retaining customers, we're up against many other factors in ag retail impacting farmers' purchasing decisions. The right loyalty

program is integrated into the ag retail business to encourage retention and revenue growth. It will drive farmers to consolidate their purchases with one retailer by incentivizing and rewarding future sales across their offerings.

Tied to the idea that today's modern consumer rewards programs provide the buyer with loyalty points and offers on future purchases, the loyalty program built by GROWERS, brings with it the opportunity to enhance customer retention through a system that carries that same feature.

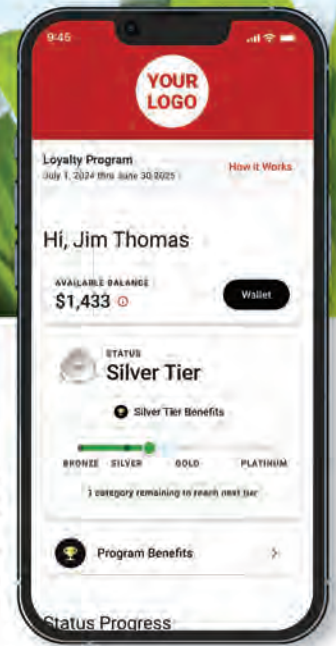
This first-of-its-kind loyalty program presents customers with the ability to collect loyalty points for future purchases with a specific ag retailer. The farmer, knowing they will need to make continued purchases on seed, crop protection, fertilizer, and application services, among many others, continues to see cost savings with each purchase they make. The retailer-branded, points-based system locks in future business by storing those customer's rewards directly into a digital wallet.

Its ease of use for the farmer customer to build loyalty points is a key feature, but the GROWERS loyalty system took it one step further by ensuring it seamlessly integrated with an ag retailer's existing internal systems.

The ultimate goal of a loyalty program is to effectively steer the desired behaviors of a customer. When you take a flexible system like the GROWERS Loyalty Program and combine it with the actions you would like to see your customers take, the opportunities are nearly unlimited to generate consistent value.

In an industry seeing shrinking market opportunities and increased size of customers, loyalty reigns king. While some may choose to compete solely on price, reduce offerings, or dip further into profit margins to retain customers, a more strategic response is to focus on customer loyalty systems and culture.

To achieve revenue growth in ag retail today, an integrated loyalty program is not only a nice-to-have, but a critical tool to remain competitive in a narrowing agricultural market. ■



¹Analyzed from GROWERS ag retailer customer transaction data



For Fertilizer, a Contrast in Numbers

Fertilizer revenues took a hit during the 2024 growing season, but this alone doesn't tell the whole story for the category.

Photo: Nuan / stock.adobe.com

BY ERIC SFILIGOJ
EDITOR

AS THE LARGEST CATEGORY AMONG crop inputs/services for the majority of *CropLife 100* ag retailers, fertilizer trends tend to overshadow overall agricultural market fortunes. And this certainly proved to be the case during the 2024 growing season.

According to data collected in the 2024 *CropLife 100* survey, the fertilizer category saw its overall revenues significantly decline. Sales dropped from \$22.4 billion in 2023 to \$19.9 billion this year – an 11% decrease, or \$2.5 billion. Furthermore, this marked the most significant year-over-year decrease the fertilizer category has experienced since the 2000s began.

Not surprisingly, with this revenue decline, the fertilizer category saw its overall market share of all crop inputs/services among *CropLife 100* ag retailers drop as well. In 2024, fertilizer accounted for 46% market share, down 2% from 2023. Not too long ago (as recently as 2022, to be exact), the fertilizer category held a 51% market share among all crop inputs/services within the *CropLife 100*.

However, looking at the revenue numbers only tells part of the story for the fertilizer category in 2024. Indeed, according to many of the nation's top ag retailers, their fertilizer volumes were almost identical to the ones they recorded during the 2023 growing season. Instead, the financial misfortunes

Acreage Numbers About the Same

Most *CropLife 100* ag retailers think corn and soybean acres will be unchanged in 2025.

What are your estimates for the acreage mix in 2025?

SEGMENT	UP	FLAT	DOWN
Corn	29%	39%	32%
Soybeans	44%	46%	10%

Base = 94 | Source: 2024 *CropLife 100* Survey

Phosphorus Remains a Harder Sell

Among the macronutrients, *CropLife 100* ag retailers said phosphorus more challenging to sell in 2024.

How would you rate selling fertilizer products in 2024?

Macronutrient	Very Challenging	More Challenging Than Normal	Not Usually Challenging
Nitrogen	12%	35%	53%
Phosphorus	12%	46%	38%
Potassium	3%	17%	80%

Base = 95 | Source: 2024 *CropLife 100* Survey

for crop nutrients in 2024 stemmed from prices.

“Yes, the cost of the fertilizer for

nitrogen and potash have come down significantly in the past year – not so much for phosphates,” says Rob

Clayton, Senior Vice President, Retail North America for Nutrien Ag Solutions. “But yes, the volumes of fertilizer being used by growers was similar to what we saw in 2023.”

And the numbers support this view. Back in 2022, as the agricultural industry (and entire globe, for that matter) finally emerged from the shadow of the pandemic, tight fertilizer supplies saw prices for many macronutrients topping \$1,500 per ton. As demand/supply began to moderate during 2023, prices dropped back by 50% to 60% for many fertilizer products. For example, nitrogen-based fertilizers that were selling for \$1,000 per ton in 2022 could be had for \$500 to \$600 per ton by the time the 2023 fall application season rolled around. For 2024, these same crop nutrients were selling for \$400 to \$500 per ton – in line with their pre-COVID costs.

Not That Difficult

For further evidence that the drop in overall fertilizer prices caused the category’s woes during 2024, consider how difficult or not the nation’s top ag retailers found selling macronutrients to their grower-customers was during the growing season. According to the 2024 CropLife 100 survey, potassium was the easiest sell for the year. Overall, 80% of respondents said convincing growers to purchase potassium was “not usually challenging.” Seventeen percent said potassium sales in 2024 were “more challenging than usual.” Only 3% found selling this product “very challenging.”

Nitrogen fertilizer showed similar trends. For these products, 53% of CropLife 100 ag retailers said sales were “not usually challenging;” 35% said they were “more challenging than usual;” and 12% said they were “very challenging.”

For phosphorus fertilizers, however, the majority of respondents – 46% – said this segment was “more challenging than usual” to sell in 2024, with 16% saying this was “very challenging.” This was probably due in part to prices for this segment not declining as quickly as those for nitrogen and potassium during the year. The remaining 38% didn’t see challenges selling phosphorus to their grower-customers.

Going into the 2025 growing season, ag retailers are hopeful that the fertilizer category will experience a turn-around of sorts. As Nutrien’s Clayton explains: “The good news for 2025 is that the crop this year was bigger, so there was a lot of nutrient removal from soils during 2024. So, what we are seeing so far is growers are not pulling back on fertilizer applications. The good growers are saying ‘yield is going to be way more important to me

in 2025 than they were in 2024. I can’t have low commodity prices times a low yield, so I have to keep more fertilizer applications strong.”

In terms of acreage numbers for next year, CropLife 100 ag retailers expect corn/soybeans percentages to remain fairly constant from 2024. For corn, 39% foresee the same amount of corn plantings next year. For soybeans, 46% predict similar acreage numbers for 2025.

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Seed Holds Steady

The seed category held onto the gains the category made during 2023. Will this remain the case in the new growing season as well?

BY ERIC SFILIGOJ
EDITOR

FOR THE SEED CATEGORY among *CropLife 100* ag retailers, 2024 could be considered a triumph — at least compared with the rest of the crop inputs/services categories. According to the 2024 *CropLife 100* survey, overall sales for the category remained flat vs. the 2023 revenues — coming in at just over \$5.8 billion each year. And since every other category recorded a sales decline during 2024 among the nation's top ag retailers, the seed category did manage to increase its overall market share among all other crop inputs/services. In 2024, according to the survey results, this rose from 12% in 2023 to 13% this year.

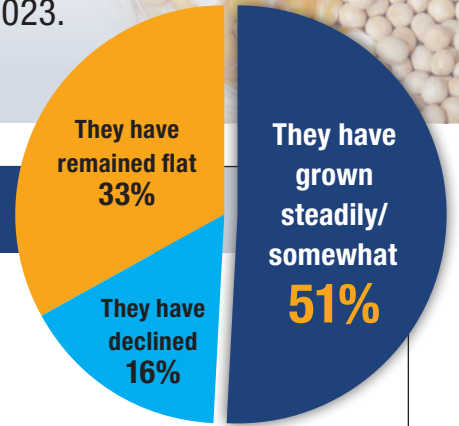
According to market watchers, the seed category benefited from not experiencing the same supply chain disrup-

Steady Seed

A majority of ag retailers say that their seed sales have improved annually for many years now.

Over the past 10 years, how would you characterize your seed sales?

Base = 69 | Source: 2024 *CropLife 100* Survey



tions/wild market price swings that have consistently dogged categories such as crop protection products and fertilizer since the end of COVID pandemic lockdowns. This kept prices and demand steady throughout each of the past few growing seasons for ag retailers.

Furthermore, overall, ag retailers say their seed revenues over the past decade have remained fairly consistent. According to data from the 2024 *CropLife 100* survey, 51% of the nation's top ag retailers that sell seed say their sales have grown "steadily" or "somewhat" since 2014. Another 33% indicated that the seed category revenues for their operations were relatively flat during this same time frame. Significantly, only 16% of respondents said their seed category sales declined over this time span.

What Motivates Seed Purchases?

In terms of what motivates seed purchases from *CropLife 100* ag retailers, the 2024 survey results indicate that there are two factors that drive the majority of sales. According to the 2024 *CropLife 100* survey, 51% of grower-customers make their seed purchases from the nation's top ag retailers based upon the type of seed variety they need/want for their crop fields.

After variety type, a distant second reason for grower-customers to buy the seeds they do ties back to location conditions — specifically soil type. This was cited by 21% of *CropLife 100* ag retailers for why their seed customers buy the seeds they do.

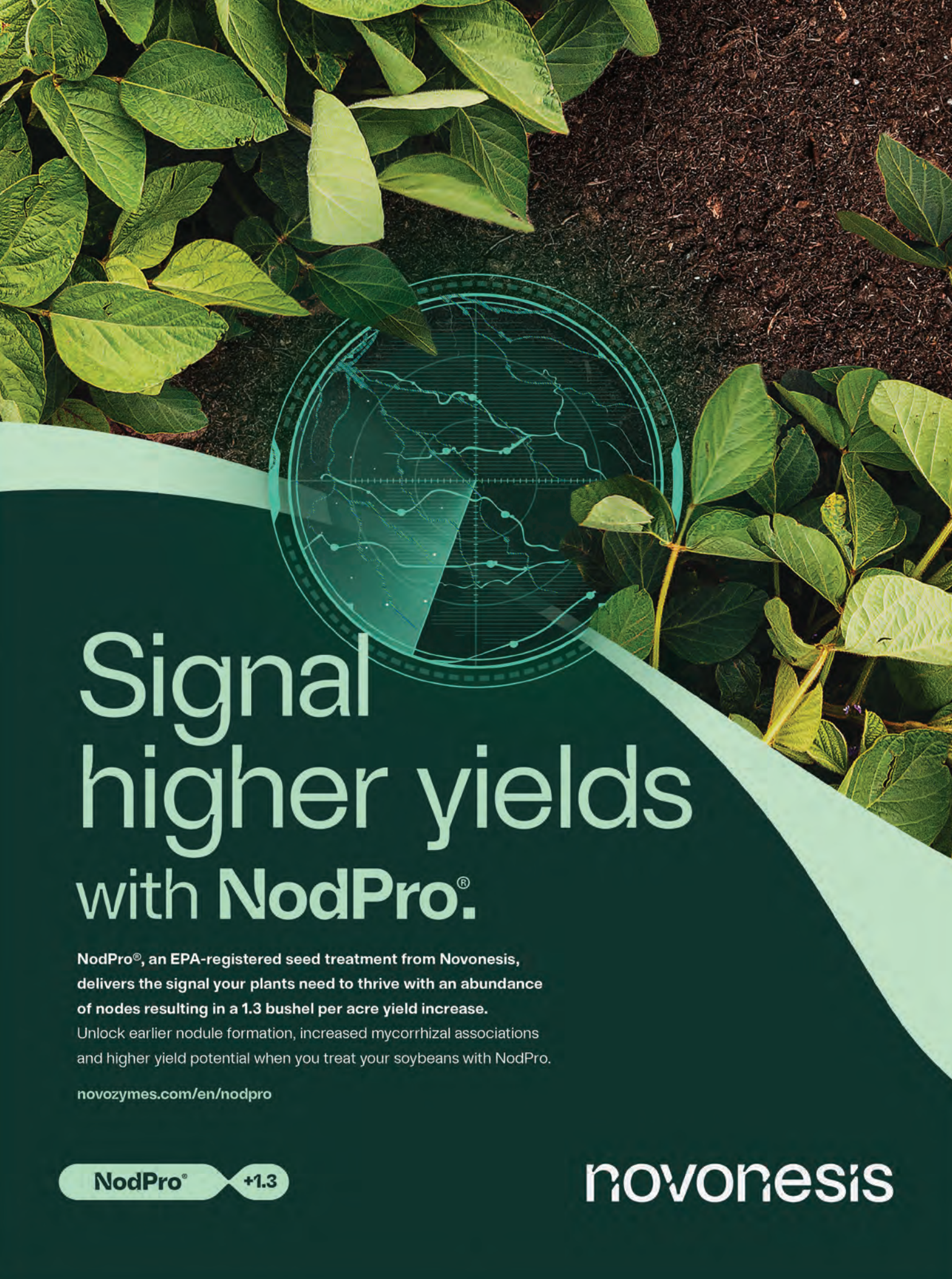
As for the remaining 18% of respondents, they indicated that their seed customers buy products based upon such factors as weather and "it's the seed type they have always bought, so our company keeps that one in stock." ▶

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The State of Herbicides

The list of factors that influence weed pests is long and varied. Providers continue to deliver new effective solutions.

BY DAN JACOBS
SENIOR EDITOR

RESISTANCE. PRE- AND POST-EMERGENCE. WEATHER. Economy. Technology ... the list of factors that influence herbicides goes on.

“When considering the future of the herbicide industry, several key points come to mind,” says Nick Fassler, Director, U.S. Technical Services for BASF. “One of the most important considerations is the continued reliance on post-emergent herbicides. It is more important now than ever for retailers and growers to devise robust weed management strategies to protect the utility of the products we have today. These strategies should utilize multiple modes of action, layering of residuals, and controlling weeds pre-emerge or while small. This helps to more effectively manage resistant weed species such as Palmer, waterhemp, and kochia, which have developed resistance to multiple modes of action (MoA).”

The variety of factors influencing the herbicide market changes with every planting season.

“While 2024 seemed like a just-in-time environment, it wasn’t,” says Jeff Wagner, Vice President Crop Protection Sales, at Nufarm. “Manufacturers had more inventory

than we wanted, which has corrected moving into 2025. The loss of over-the-top dicamba applications brought a surge in demand for burndown products and we delivered that capacity. It was notable that newer combination herbicides addressing weed resistance picked up share.”

While the 2024 planting didn’t turn out to be a just-in-time environment, 2025 might turn out to be one — not by choice, but by necessity.

“While weed seed banks are loaded, economics at the farmgate won’t allow most growers to take product before its needed,” Wagner says. “The channel will need to react to demand more quickly and efficiently, putting retailers in a competitive position to service the grower.”

2024 proved to be a challenging year, says Carlos d’Arce Junior, UPL North America Portfolio Lead – Herbicides, UPL.



Left: Surtain nontreated; Right: Surtain Pre Treatment Photo: BASF

“We knew going into the season that 2024 would be a very challenging year,” he says. “There were signs that the prices of agricultural products were going to return to pre-pandemic levels, which combined with a need to adapt to the volume of inventory that was in the field. Anticipating that, UPL returned to an approach to growing in the market in a more sustainable way.”

With a rough 2024 season behind them, companies are expecting a better year.

“The outlooks for 2025 and beyond are more optimistic,” d’Arce says. “UPL will be bringing innovative solutions to market that will hand more control back to growers in the fight against resistant weeds.”

Nufarm’s Wagner also looks forward to the coming year.

“2025 will be the first just-in-time market through the value chain, placing the focus on two-way communication,” he says. “We need to understand expectations on the herbicide demand front as we focus on delivering fall and spring burndown products with the right amount of inventory.”

While herbicide manufacturers continue to deliver new solutions, nature continues to throw up roadblocks. For example, weed resistance continues to be a major hurdle for growers.

“The herbicide industry has witnessed significant technological advancements in recent years,” BASF’s Fassler says. “One notable improvement is in product formulations, such as encapsulation technology, that can enable wider or new application windows. In addition, the growing interest in using drones for herbicide applications has been driven by the scalability of drone technology. Another exciting development is the adoption of optical spraying technology, like One Smart Spray or John Deere’s See & Spray; both will change how growers manage weeds in the future.”

Challenges

“Despite a general decline in costs for fertilizers and crop protection products over the past few years, farmers are still concerned about increases in costs,” UPL’s d’Arce says. “Extreme weather events are also a top concern for the coming

season. Another topic that is top of mind with farmers going into next year is the volatility of commodity prices and how that will affect their profitability.”

The regulatory environment forces manufacturers to adjust their crop protection portfolio. Nufarm has adjusted



Jeff Wagner, Nufarm

“The impact that tariffs play on the cost of 2,4-D are real but navigable. We’re going to continue to see 2,4-D bring value and utility to a full range of spray applications.”

its offerings to deliver products that are no longer available.

“As we face a patent cliff with crop protection herbicides, Nufarm’s pipeline will focus on bringing incremental value to channel partners, retailers and the growers they serve,” Wagner says.

In addition to the company’s portfolio, Nufarm also works with a variety of companies to ensure it’s able to deliver the solutions growers need. “We’re engaged in discovery partnerships with Enko, MOA, and others to evaluate the potential of new molecules more efficiently.”

One issue they hope to address is herbicide resistance.

“The increase of kochia resistance to Groups 2, 5, and 9, including fluroxypyr, makes new options critical to success,” Wagner says.

Even with a diverse portfolio, Nufarm must find ways to ensure its

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Herbicides

herbicides are available. In the past couple of years, one of the challenges manufacturers and the retailers who sell their products is managing supply disruptions.

“Herbicide innovation also means supply chain innovation,” Wagner continues. “Nufarm has modernized and doubled its herbicide manufacturing capacity across the past year to deliver the capabilities necessary to support reduced lead times in tomorrow’s crop production environment.”

Regulatory Concerns

“The largest challenge impacting the seed treatment industry is the urgent need for effective regulatory frameworks around the world that support the efficient introduction of innovative crop protection technologies and seed treatments,” says Eric Boeck, Regional Director North America Seeds, Syngenta. “We also are committed to continuing to raise grower awareness of pests that are not as visible — such as plant-parasitic nematodes in soil — or

“As the first point of contact for growers, retailers and agronomic sales personnel provide essential local expertise on incorporating new products and services into herbicide programs.”



Nick Fassler, BASF

evolving pest and disease threats such as *Fusarium* stalk rot in corn and *Fusarium* crown rot in wheat.”

Following the 2016 presidential election, Donald Trump instituted a variety of tariff that concerned a number of products. President Joe Biden left many of those in place. Trump promised not only to continue tariffs, but also to increase them. During the campaign, Trump repeatedly touted his plan to increase tariffs. With his reelection to the highest office in the land, we’ll see if he follows through on those promises, how they’ll be impacted and what it means for growers

across the country.

“The impact that tariffs play on the cost of 2,4-D are real but navigable,” Nufarm’s Wagner says. “We’re going to continue to see 2,4-D bring value and utility to a full range of spray applications.”

While the election could affect the cost of future products, it is far from the only issue.

“As we approach the new planting season, a critical evaluation of past seasons can help identify successes and areas needing improvement, particularly considering the impact of weather on field conditions,” BASF’s Fassler says. “Growers increasingly rely on a limited number of effective herbicides, and using residual herbicides to control weeds early is crucial. Timely management of weed populations is also essential to ensure effective weed control throughout the season. We continue to recommend using multiple modes of action and a plan that includes effective pre-, post-, and layered residual herbicides to control weeds until canopy closure.”

Retailer’s Role

Whether it’s new products or supply chain disruptions, retailers must continually adjust to an ever-changing market.

“As retailers put themselves in position to service the grower on a just-in-time basis they’ll need capable suppliers who can deliver the first and last gallon with speed and agility,” Nufarm’s Wagner says. “Foundational product reliability for glyphosate, 2,4-D, and dicamba will stay core to the grower alongside innovative herbicide opportunities that create value. Retailers evolve in 2025 as agents of value when it comes to herbicide availability, savings and ROI.”

Continued on p.48

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Continued from p.46

BASF's Fassler agrees that retailers have an important role in the future of herbicide use.

"Retailers play a pivotal role in developing and implementing herbicide plans," BASF's Fassler says. "As the first point of contact for growers, retailers and agronomic sales personnel provide essential local expertise on incorporating new products and services into herbicide programs."

Manufacturers are generally optimistic. Syngenta's Boeck sums up the sentiment for 2022 and beyond.

"At Syngenta, we have a robust pipeline of new and highly effective technologies as well as an expanding portfolio of biologicals, and we expect our business to grow on the back of new product launches and greater awareness of the threat from plant-parasitic nematodes," he says.

Delivering a Dry Glyphosate

Fry Brothers developed and delivered a new product for customers seeking an alternative to the classic herbicide.

BY DAN JACOBS
SENIOR EDITOR

GLYPHOSATE HAS LONG BEEN one of the most popular herbicides in the crop protection marketplace. Despite crops showing resistance the product remains among the most popular product available to growers around the world. As a generic available from major manufacturers around the world, it's a wonder why a relatively small provider would spend the time and expense to create a competing glyphosate offering. But that is just what Kevin Fry, Owner

of Ewing, NE-based Fry Bothers Fertilizer & Chemical, chose to do. *CropLife*® magazine reached out to Fry to learn why he invested the time and energy to compete with companies magnitudes of order larger.

CropLife: What caused you to start this venture?

Kevin Fry: Circumstances were the main driver. It was not a grand plan or anything. I have been selling a small amount of dry glyphosate from one of my vendors into the VM market for several years. However, it was always higher priced than liquid glyphosate, hence we never tried to incorporate it into the row crop market.

The pandemic created all sorts of chaos, and the crop protection chemical industry was no exception as fears of shortages doubled and in some cases tripled prices of chemical products. Generic 5.4-pound glyphosate went to \$60 per gallon as an example. My vendor of the dry glyphosate came to me and said that dry glyphosate was cheaper than current liquid glyphosate. This would have been in the fall of 2021. They asked me if I thought I could sell dry glyphosate into the row crop market. I took a risk and bought some. In fact, I bought almost \$1 million worth. That's how it got started.

CL: When did you realize that this could be a viable solution?

KF: I had several small- and medium-sized farmer customers and one dealer customer who initially began to use the dry glyphosate. In the 2022 season, we could price it below liquid glyphosate so I was fairly confident we could make some initial sales.

The dealer-customer who worked with us quickly came back with a

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positive response. They said it mixed well and they even thought its efficacy in killing weeds was as good or even better than the liquid.

Our farmer customers who used it initially came back for post-emerge spraying. Needing more glyphosate they would say, “I need some more glyphosate – and give me that dry stuff.” At that point I felt there could be a market.

CL: What challenges did you face?

KF: After this, I knew the biggest challenge was going to be whether or not we could price the product competitively or comparatively in the long term. Otherwise, this was just going to be a flash that would flame out once things got back to normal.

I wanted to use my current supplier so I approached them with some ideas of how we might work together. I knew once we got back to a normal market, price was going to be a hurdle. Once things got back to normal the price relationship between the dry and liquid went back to normal also. I felt the price point was too high to create any chance of having a viable market volume to support all the underlying costs and effort.

I found an industry consultant who agreed to help me navigate some things. He had extensive international commerce and regulatory experience, which is what I lacked. We found that if we had our own registration we could potentially be at least comparative with some segments of the liquid market.

CL: Tell us about the registration process.

KF: The costs of bringing a registration, I suppose, depend on many factors and some registrations will cost significantly more than others. Estimating the cost of getting a dry glyphosate product on the floor, I felt we could generate enough sales for a small company like ourselves to make it work. Larger companies I doubt would look at it. This is not going to be a high-


volume product but I think it will find a niche.

CL: What were the regulatory hurdles?

KF: I was fortunate to have some people who were willing to help me who knew their way around the regulatory requirements. I just depended on their expertise. We had to jump through some hoops that took some time. I think we ended up with a good label and excellent packaging.

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We are working on some changes that will make it even better. We hope to have those changes completed for the coming season.

CL: How does it fit into your existing operation?

KF: We formed a new corporation to hold the registration. I felt we had to do that because our existing company did business on a wholesale and retail level. The registration of MOAB 75SG put us on a manufacturer's level. Vendors and customers would be different.

CL: What are your expectations for the product (market size and reach)?

KF: I don't expect MOAB 75SG is going to replace the large majority of glyphosate volume in the U.S. Trying to do something like that would set MOAB 75SG up for failure. I can see the product helping retail locations handle small- and medium-sized customers more efficiently. MOAB 75SG should replace a fair amount of glyphosate in 30s and 2x2.5s. It's easier to handle. You don't have

drums, cardboard boxes and plastic bottles to throw away. When you're done using MOAB 75SG, all you have left is a plastic bag to throw away.

Many retailers provide a tote along with a pump and meter to customers who don't want to handle drums and 2x2.5s. Even some of these farmers are smaller farmers. Dealers can move these customers to MOAB 75SG and reduce the use of totes and pumps and meters, which is a cost to the dealer. Reducing the number of totes and pumps and meters to purchase and maintain is a cost savings to the dealer.

CL: How you go about promoting the product MOAB 75SG?

KF: We only have one label so getting to market will have some challenges. The first challenge is just awareness. Most people in the U.S. ag industry don't even know what a dry glyphosate is or how it's used. I've had people think initially

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it gets spread on the ground as a dry product. Liquid glyphosate is so ingrained in the U.S. market's psyche that they can't visualize it at first.

We are going to create awareness at all three main levels of the crop protection industry, i.e., distribution, retail, and end user. I have some ideas on how it might go but I don't want to pre-judge. I'm going to create awareness to MOAB 75SG as efficiently as possible, see where we are having success and then concentrate on that channel. We won't have a big marketing budget.

We're also going to do some digital marketing. Although we haven't done much of that in our existing business, I know that it would be helpful to have some kind of digital presence. I'm a bit old school so I know I'm going to have to have some help with that also.

Lastly, I'm contemplating about making the claim that MOAB 75SG is the best glyphosate for killing weeds in the market. MOAB 75SG has a higher surfactant load than any liquid glyphosate I know. At least the ones who will tell you what load percentage they have. And MOAB's surfactant load carries the best performing surfactants you can use. I plan to enlist some university or third-party trials in order to back up this claim. The reason for this is that I have had several of my customers who initially used MOAB come back in a voluntarily make the claim, "I think it works better than the liquid." So, I plan to investigate whether it does work better.

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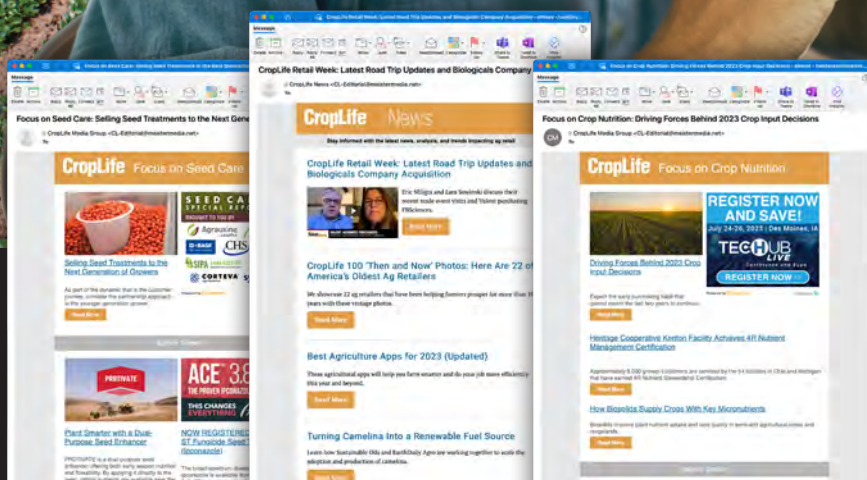
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Admiring the Merits of Scouting Tools

Many of the challenges growers face can be overcome or diminished with scouting tools.

BY DAN JACOBS
SENIOR EDITOR

THE FOUR ESSENTIALS OF FARMING: Seed, soil, water, and technology.

For those whose understanding farming is a weekly trip to the grocery store, that last item might not seem essential. Whether its weeds, insects, disease, regulations, or weather every passing year, the need for technology grows stronger and provides farmers a deeper understanding of the tools of the trade. Scouting tools are high on that list.

“Reflecting on the past few years, growers have been more willing to try new technologies and tools when commodity prices have been favorable, and risk has been low,” says Tryston Beyrer, Crop Nutrition Lead, The Mosaic Co. “Many growers may have implemented the ‘easy button’ and treated many of their acres the same; however, in more challenging times ahead this is when technology should be embraced to bring greater ROI to each acre on their operation. There are more apps and connectivity between platforms has improved but still has significant opportunity for improvement.”

Despite the promise, AgWorld’s Scott Cogdill, Director of Business Development, Almanac, believes the market is going through a contraction.

“The scouting tools market has declined significantly, with far fewer options available today than just five years ago,” he says. “This contraction is largely due to disconnected, cumbersome tools that failed to deliver actionable insights and didn’t endure. Many of these tools prioritized seemingly in-

novative features that didn’t translate into efficient workflows or meaningful integrations. In contrast, scouting tools that are efficient, intuitive, and connected to a broader ecosystem have proven resilient. Scouting is just one of many workflows that support decision-making throughout the growing season, and tools that integrate seamlessly into this larger process have had lasting success.”

Changes to how the tools work can lead to that success.

“The industry push toward climate-smart agriculture and carbon management is opening up major opportunities for scouting tools,” says Tyler Lund, Vice President, Business Development, Veris Technologies, Inc. “Farmers need to be cautious about carbon programs that don’t use intensive sensing and sampling protocols.”

Given their growing popularity, it’s not surprising a variety of companies offer scouting tools.

“There are a lot of new players in this space that are looking at new ways



Solitech Founder and CDO Ehsan Solatn (right) works with a customer to install the company’s scouting tool. Photo: Solitech



No ground engaging components, except at probe locations, creates a wide mapping window for the Veris’ CoreScan. Photo: Veris Technologies

to improve scouting,” says WinField United’s, Director of Crop Protection, Tom Fry. “The bottom line is that regardless of the approach a retailer or farmer uses in scouting, some type of scouting is always better than not scouting at all. Scouting is critical in maximizing a farmers’ return on investment and assisting them to address the timing of application and crop input product selection throughout the growing season.”

With multiple players there are some concerns.

“Most systems are isolated and exist within their own platform and do not allow for integration or only allow for data layers from sources that are not ground truthed to the field or storage location,” says Ehsan Soltan, Founder and CEO of Soiltech Wireless. “Soiltech offers the ability to pool data from multiple sources and to push out data from the Signal platform, via API, to other systems seamlessly.”

Advances as the tool have become, the human factor will continue to be the most important role.

“Scouting will always be based on the need to walk fields and observe what is going on throughout the growing season,” says Winfield’s Fry. “An agronomist still relies on their eyes, their agronomic knowledge, a pocketknife, a spade and a soil probe as critical tools for crop scouting. But there are new tools that are changing

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the speed with which scouting is shared and new tools that can augment field visits. The biggest change recently is the use of technology and software that enables the agronomist to send what they observed via text or email to the grower immediately following a scouting trip.”

Evolution

“The role of crop scouting tools has evolved from manual fieldwork with pen and paper to advanced, automated digital solutions driven by AI (artificial intelligence) and high-resolution imagery,” says Aman Anand, Senior Manager, Retail Partnerships at Nutrien Ag Solutions. “The journey from manual fieldwork-based scouting to directive scouting with the help of satellite-based imagery provided a range of data that enhanced our understanding of multiple areas of agricultural operation, ranging from disease and pest detection to yield prediction.”

Scouting tools help growers explore a variety of yield limiting pests, they employ it with a variety of methods.

“New technologies include high-resolution photography, satellites, drones, robotics, and software that can combine multiple sources of data into a more complete picture of what’s going on in a field during the growing season,” WinField’s Fry says. “New startups are focused on bringing greater insights and efficiencies to scouting technology.”

One way they help is giving growers the ability to see more of their field than ever before.

“The first big thing is that scouting tools like high-resolution imagery make it possible to look at every square foot of a field, compared to looking at what we thought were representative areas,” says Keith Byerly, Commercial Sustainability Lead, The Mosaic Co. “Things like nutrient deficiencies in a crop can be triggered by very small changes in soil pH, compaction, or other nutrient availability. Being able to have a complete picture of the field is a great first step.

“Twenty years ago, I kept several books in the pickup when I was scouting to identify a weed, an insect, or a crop nutrient deficiency that I saw when I was in the field,” Byerly continues. “Today, with my phone I can

Personalization and the ability to review data from years ago is one advantage.



Photo: Nutrien

use an app to identify those same items as I stand in the field. With better cameras, sensors, and programming, the UAV that is flying a pattern on my field weekly is identifying those same issues from above. Even beyond that, sensor platforms can identify stress in my plant before the naked eye can, and using models anticipate what is to come. Identifying nutrient deficiencies before they can be seen might give the grower time to correct the deficiency before it reduces yield.”

Scouting tools have gone beyond identifying the problems. Today, they also lead to solutions.

“Farmers are asking for solutions, not just red flags,” says Veris’ Lund. “They want tools that diagnose the ‘why’ behind field issues and, importantly, how to tackle them. This shift means scouting technology has to answer those questions clearly and directly.”

Drivers

“The increasing focus on soil health, carbon sequestration, and sustainable farming practices are key trends influencing the scouting tools market,” Lund says. “Growers and agronomists are beginning to look below the surface to identify yield limiting factors. We’re now exploring what in the rooting profile is holding us back.”

Like many new tools, technology is one of the first things sacrificed when money grows tight.

“In 2024, low commodity prices made profitability a key concern for growers, increasing demand for cost-effective solutions,” says Paul Bonnett, Senior Director, Agronomy and Environmental Sciences at Nutrien Ag Solutions. “Personalization and the ability to review data from years ago is one advantage.”

“Two trends are leveraging historical data and customizing

workflows,” AgWorld’s Cogdill says. “While these concepts can take many forms, they range from displaying summaries of past events in real time while scouting to offering multi-year field history. Workflow customization will have a particularly significant impact. Anyone who has scouted with digital tools understands the inefficiencies of a one-size-fits-all approach when recording observations in the field. Allowing retailers to create region- and season-specific attributes and workflows can make a meaningful difference for their organizations and grower-customers.”

Grey Montgomery, General Manager, Agriculture for DTN, suggests two additional drivers: “There are many platforms, sensors, and datasets available to farmers, but it is difficult to find a solution that can integrate the data in a way that a grower can access and use to make decisions with,” he says. “The trend of IoT (internet of things)/remote sensing will continue to improve in the market.

“Sustainability reporting is another trend that will drive innovation in scouting tools,” he says. “This trend is being accelerated by the USDA with their Partnerships for Climate Smart Commodities programs, of which DTN was a recipient, as part of the Farmers for Soil Health Climate-Smart Commodities Partnership. Over the next 12 months, we expect to develop more ties between DTN sustainability products and DTN Agronomy.”

Despite the technology leaps, more are likely to come.

“We’re likely to see more farmers incorporating a new tool called the CoreScan, a new scouting and sampling tool that allows farmers to understand critical soil properties such as compaction, nutrient dynamics, carbon content, and texture at 1 cm intervals through the profile,” Veris’ Lund says. ▀

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“Young people who choose agriculture as a profession and likewise view it as a meaningful endeavor, gives me a lot of hope.”

Taking Stock of All That’s Good

THIS YEAR HAS BEEN EXTREMELY tough for farmers. The combination of rising input costs, extreme weather, and instability in commodity prices, not to mention a stalled Farm Bill, weighed heavily on U.S. farm incomes.

Fortunately, there are silver linings among the clouds. Young people who choose agriculture as a profession and likewise view it as a meaningful endeavor, give me a lot of hope. Another is the ongoing progress in ag tech and how certain “tried and true” technologies are making measurable and positive impacts for farmers.

At the same time, witnessing the resilience and fortitude of farmers is as humbling as it is encouraging.

During this year’s VISION conference, Vasanth Ganesan, a Partner with McKinsey & Company, offered insights on farmer sentiments and trending ag tech in the U.S. and globally.

Ganesan and his colleagues’ latest report, Global Farmer Insights 2024, contained several positive developments that are worth noting. Here are a few that stood out for me: In North America, farmers identified three key areas for increasing their profits over the next two years: improved yields, higher crop prices, and lower prices for inputs. To get there, farmers said they would try new yield-increase products (57%) and new crop protection products (37%), as well as purchase innovative equipment, products, or technology (29%).

These farmers see adoption of sustainable practices as a way to improve yields (77%), lower production costs (58%), and provide additional revenue stream (44%).

In the U.S. specifically, the highest-ranking sustainable practices included crop rotation (87%), reduced or no tillage (78%),

variable rate spraying or fertilization (56%), planting cover crops (49%), and use of biocontrols, biofertilizers, and biostimulants (23%).

Although the use of biocontrols and bio-nutrients is growing globally, the U.S. lags leader Brazil, where 64% of respondents currently use biostimulants/biofertilizers, and Europe, where 33% report use of biostimulants/biofertilizers. In the U.S., it’s 26%.

When it comes to ag tech adoption, North American farmers outpaced others with 75% reporting use or willingness to adopt at least one technology, compared to Latin America (60%), Europe (55%), and India (11%).

In addition, large American farms (more than 2,500 acres) were 45% more likely to adopt ag tech than small farms (less than 100 acres), according to the report.

Nonetheless, ag tech adoption faces challenges. Just over half of North American farmers found unclear ROI (53%), high implementation and maintenance costs (41%), and time-consuming set-up and inability to understand ag tech (35%) as the biggest barriers.

Lastly, there is another thing to feel good about, and that’s the new Biostimulant Innovator of the Year Award, sponsored by Valent Biosciences in partnership with Meister Media Worldwide (publisher of *CropLife*® magazine).

“This award is our way of showcasing those who are leading the charge in innovation and inspiring others to do the same,” says Shane Hand, Vice President of Global Marketing and Business Development at Valent BioSciences.

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