

**AGRI
TECHNICA** ^{DLG}
THE WORLD'S NO. 1

The world's leading trade fair
for agricultural machinery

9 – 15
NOVEMBER
HANOVER
GERMANY

20
25

AGRITECHNICA 2025
INTERNATIONAL PRESS
CONFERENCE

touch smart
efficiency

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MADE BY



INTERNATIONAL PRESS CONFERENCE 2025 - PROGRAM



Milestones for Sustainable Productivity Growth
Dr. Lothar Hövelmann, Chief Executive Officer, DLG e.V.

Market and Economic Trends in the Ag Tech Industry
Dr. Tobias Ehrhard, Managing Director, VDMA Agricultural Machinery Association

AGRITECHNICA 2025: Touch Smart Efficiency
Timo Zipf, Project Manager AGRITECHNICA

Announcement AGRITECHNICA Innovation Award
Dr. Markus Demmel, Chairman of the DLG Innovation Commission

Questions

Organizational Information



AGRITECHNICA 2025

Milestones for Sustainable Productivity Growth

Dr. Lothar Hövelmann
Chief Executive Officer - CEO
DLG



Major drivers for the agricultural sector

**War in Ukraine and effect on
state budgets in EU**

Situation in the Middle East
(problems with trade routes by ship) -
supply chains at risk

**Unpredictable US Tariffs
influence trade conditions**

Extreme weather conditions

**Bureaucracy and Regulation /
Adjustment Common Agricultural
Policy (CAP)**

**Sustainability demands
versus economic upswing
across the globe**

High demands from the market, society, and politics

Milling wheat, Euronext Paris, in €/t



Soybean, CBoT, in US-Cent/bushel



big harvest of grains and oilseeds 2025 - rising prices unlikely

rising input costs

stagnant or declining producer prices

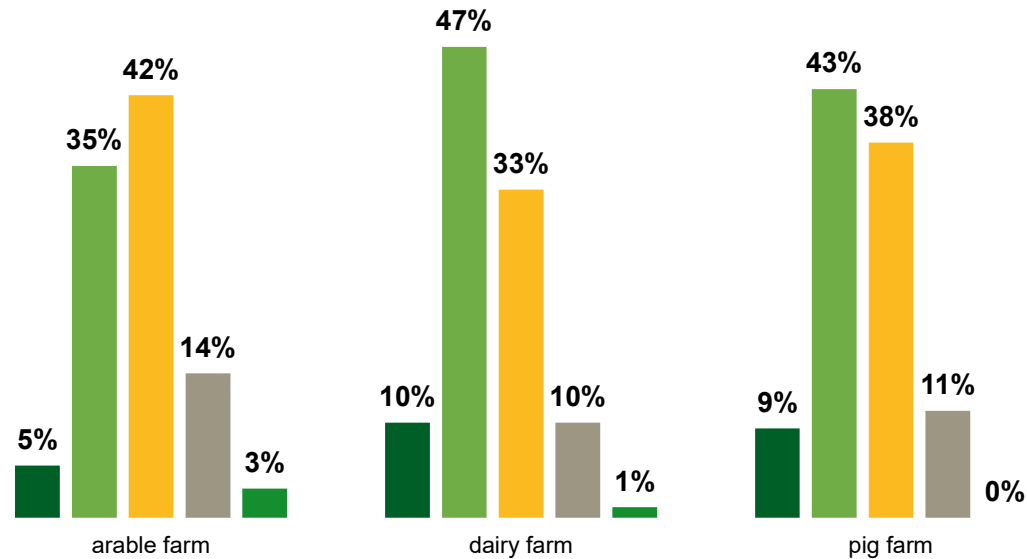
environmental protection requirements

political and societal expectations

Economic Situation

Business Development

■ 1 = very good ■ 2 = good ■ 3 = neutral ■ 4 = poor ■ 5 = very poor



n = 1146
912 Germany / 234 International
arable farm 695, dairy farm 190, pig farm 56

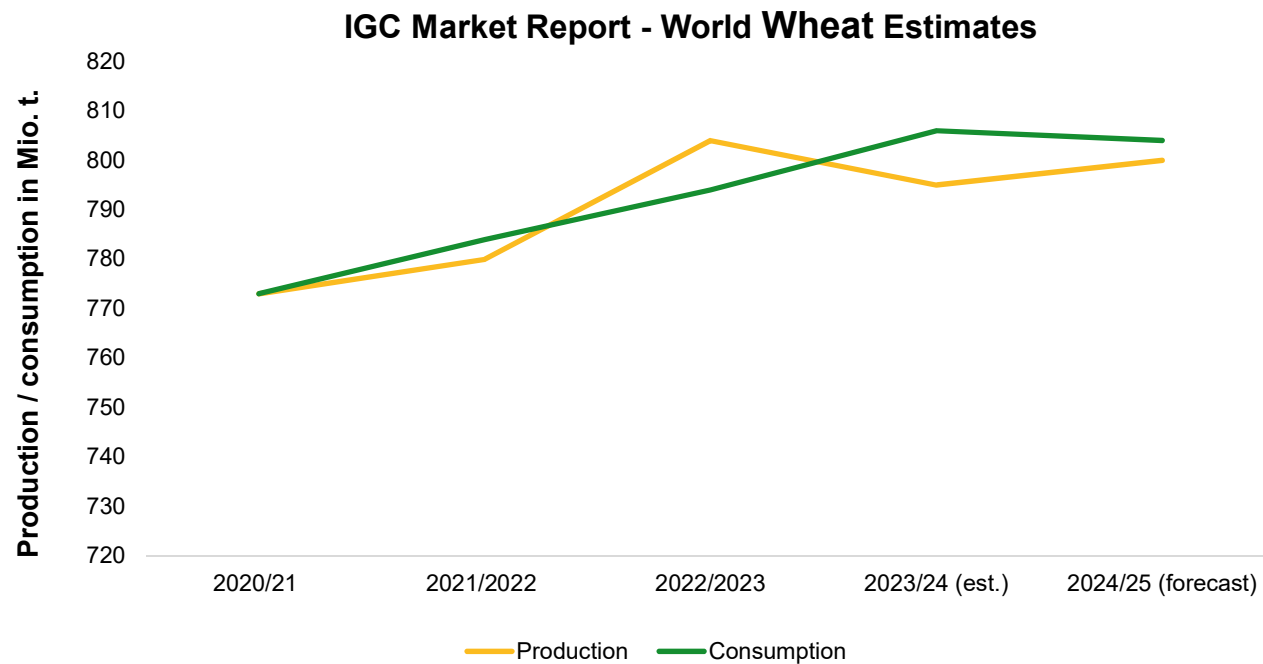
40 % of arable farmers
expect a good or very good
business development

More than **50 %**
of dairy farmers and pig farmers
expect a good or very good
development
due to better market prices
compared to crop prices

Source: DLG-Agrifuture Insights, n = 2184, survey spring 2025

Global production and consumption:

Need for increasing productivity



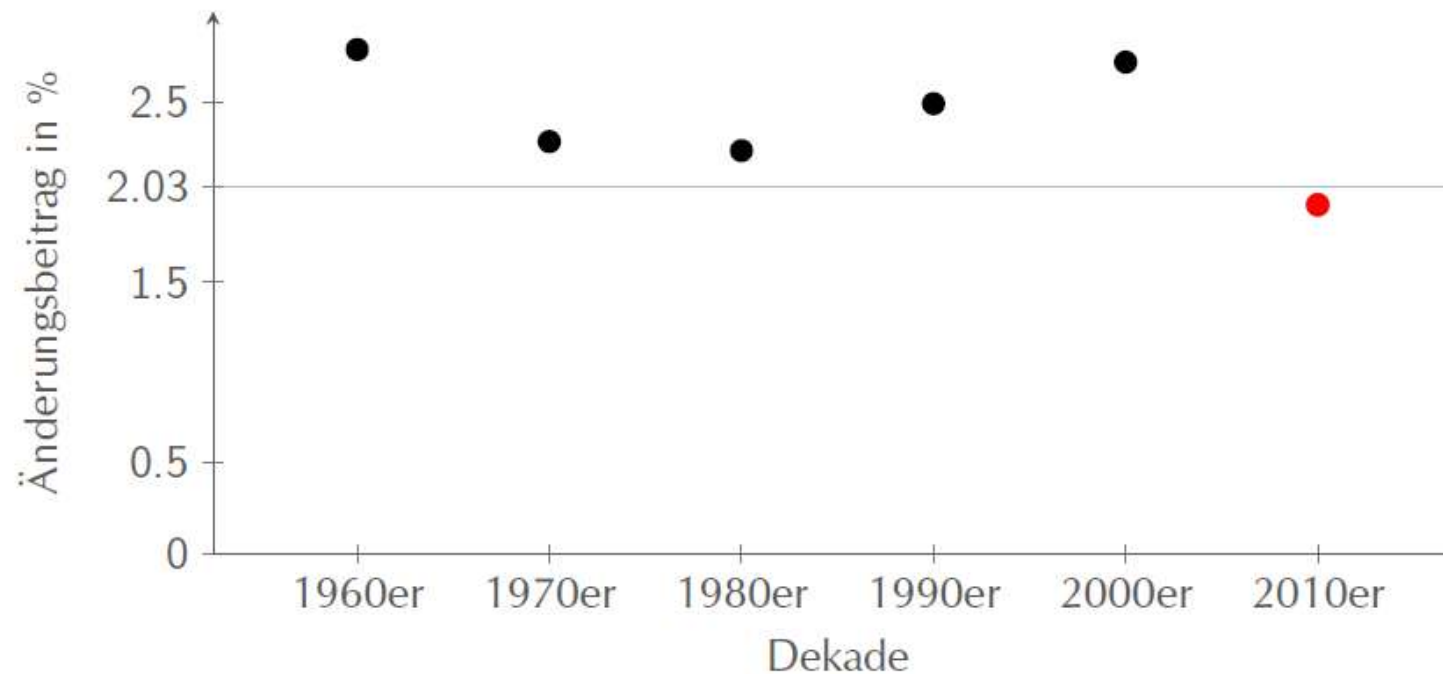
Consumption higher than production

Climate change → stable harvests
uncertain

Source: <https://www.igc.int/en/markets/marketinfo-sd.aspx>

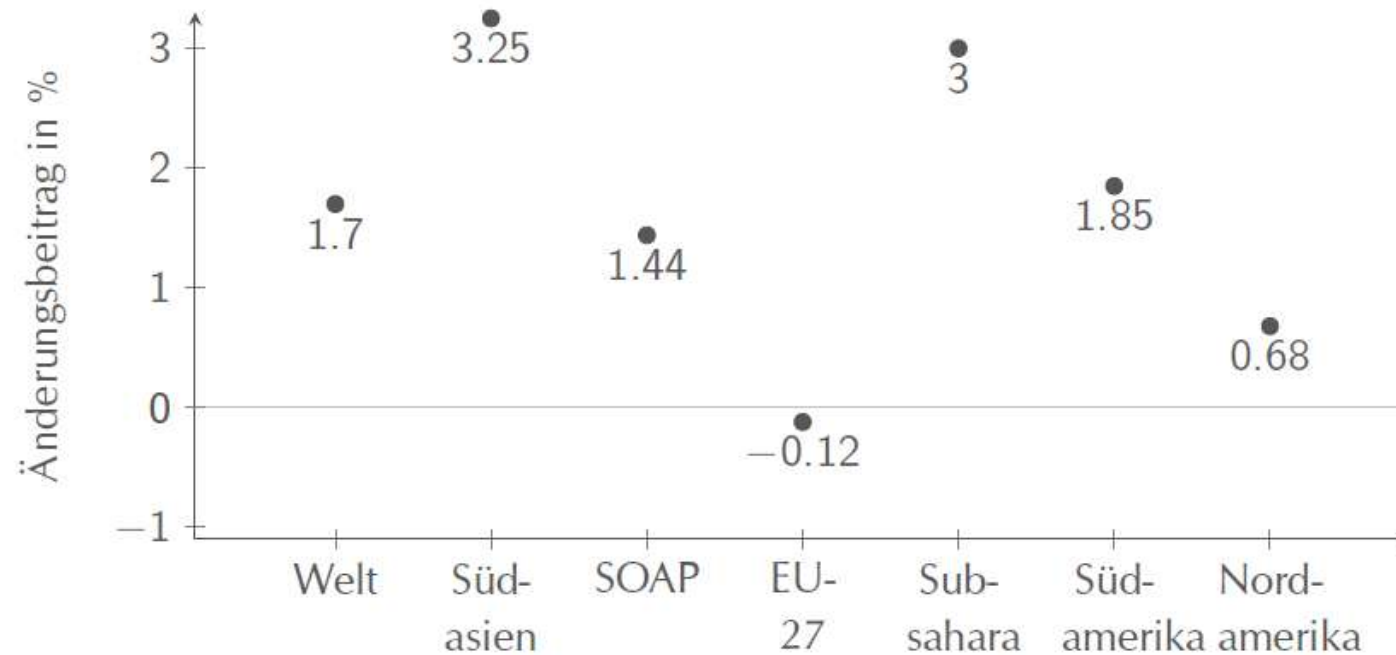
Global growth of agricultural production 1960-2020

Globales Wachstum der Agrarproduktion 1960-2020



Global growth of agricultural production 2013 - 2022

Globales Wachstum der Agrarproduktion 2013-2022



Sustainable productivity growth – key solution!

Biodiversity, climate protection, and animal welfare require a solid economic foundation

Enabled by site-specific and innovative production methods.



Strengthening the resilience of farms and businesses

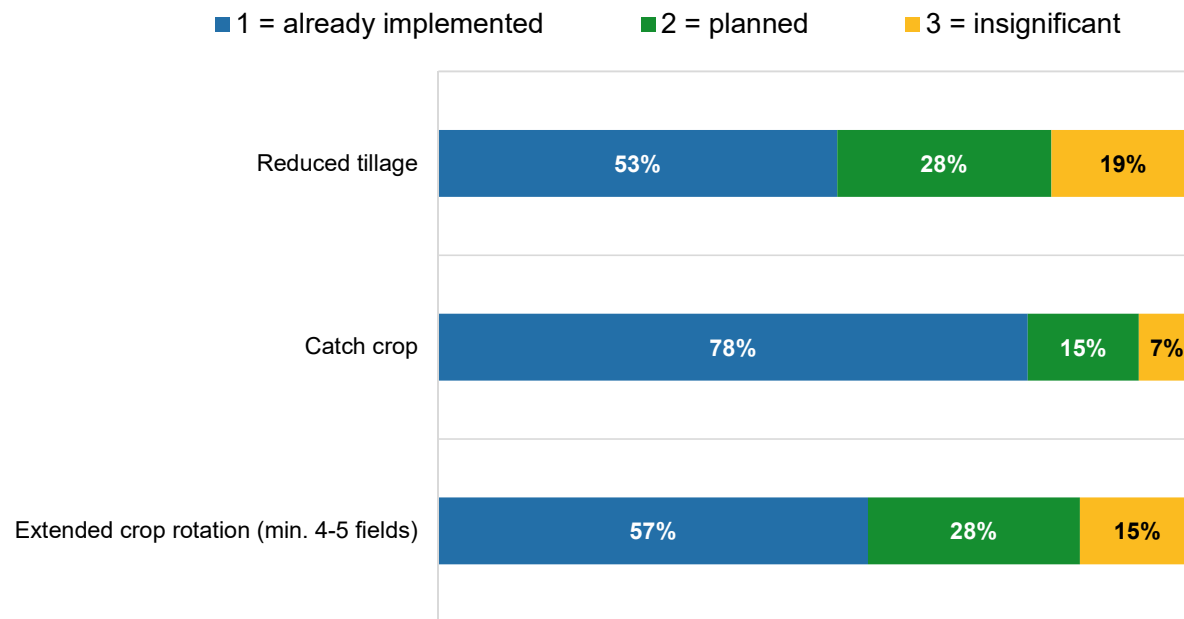
Process in DLG and its committees has started to how to achieve this sustainable increase in productivity



Potential is developed in a way that optimizes the balance between productivity and resource conservation.



Soil health



Agrifuture Insights shows that

- catch crops are already widely implemented among farmers
- reduced tillage or diverse crop rotation
- are already implemented by more than half of the participating farmers
- are planned by another 28%

Source: DLG-Agrifuture Insights, n = 2184, survey spring 2025

n = 755 (Germany 612, International 143)

Spotlight Soil health

Together with other exhibitors and different institutions offering different perspectives on the very important topic soil health

Interactive highlights on:

- Soil rest
- Soil biodiversity
- Permanent ground cover and living roots



Regenerative agriculture



Regenerative agriculture is being discussed as a concept for the further development of agriculture. It focuses on soil health in order to stabilise soil functions and, on this basis, achieve yield security under changing conditions.

- **Minimal soil disturbance**
- **Permanent soil cover**
- **Diverse crop rotation**
- **Year-round living roots**
- **Animal integration**

➤ **Controversial discussion in agricultural practice about implementing the whole system**

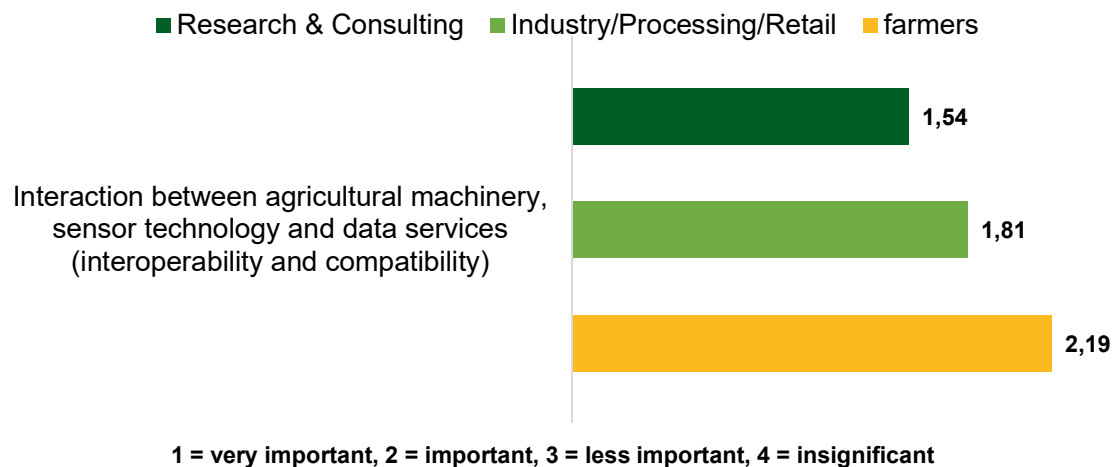
DLG has taken an in-depth look at regenerative agriculture

- Discussion in DLG committees (e.g. committee for arable farming)
- Interdisciplinary working group has been established and has published a positioning paper
- DLG Expert knowledge papers on the individual aspects are currently being prepared

Spotlight also serves to bring approaches of regenerative agriculture into practice and to give visitors impulses

Digitalisation as key factor for productivity growth

What relevance will the following technological trends have for your business in the future?



n = 1079

788 Arable Farms, 101 Research & Consulting, 136 Industry/Processing/Retail

Rated less important by farmers than by research and consulting

Barriers for digitalisation:

- Data protection and data sovereignty
- interface issues
- lack of user-friendliness
- lack of IT know-how

Source: DLG-Agrifuture Insights, n = 2184, survey spring 2025

Digital Farm Center – to overcome barriers

Hall
21



Hall
20

Hall
22

Hall
24

15



- **Central hub for digitalization at the trade fair:** Future topics in agriculture, such as **artificial intelligence, autonomy, robotics and drones**, will be presented in a bundled format.
- barriers shall be overcome by dialogue between farmers, manufacturers and scientists
- provide impetus to make the digital applications of different manufacturers compatible with each other
- Farmers will need to be able to manage data streams and use digital tools effectively
- training and continuing education are becoming increasingly important
- Some farmers are reluctant to invest in digital products.
- These barriers need to be taken down.

Market-ready solutions will be showcased at Agritechnica, the Digital Farm Centre and its integrated DLG Spotlight on Digital Farming.



DLG-Spotlight Digital Farming



Exhibitors and institutions showcase:

- **Live demonstrations of seamless networking between farm management systems and agricultural machinery**, enabling the creation and exchange of application maps.
- **Integration of diverse data sources**, both internal (e.g. field, barn, biogas plant, office) and external, to support informed decision-making.

DLG-Spotlight Digital Farming

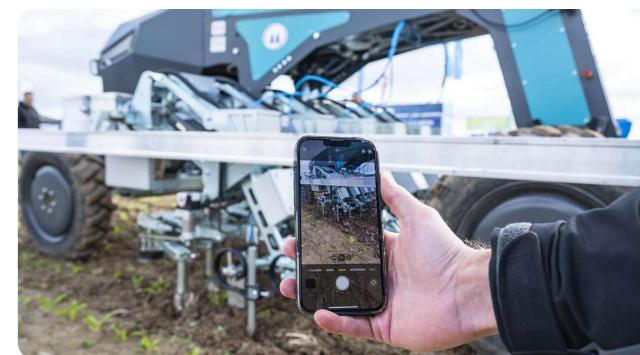
Platform for exchange:

- Experts and innovators gathered in one place

Perfect place to accelerate digital adoption

Presentations on:

- Autonomy, robotics, drones
- data protection, cybersecurity, and system resilience
- Integration of diverse data sources and using AI for data evaluation
- Every day practitioners' hour: Pioneering farmers and contractors will share their experiences with autonomous tractors, spot spraying in crop protection, and the use of robots for weed control in sugar beet cultivation.



Shortage of skilled workers

Increase in minimum wage (Germany) and growing difficulty in recruiting labor—especially in the cultivation of specialty crops—

➤ could lead to a rise in demand for robotics.

significant potential to make work processes more efficient and resource-friendly

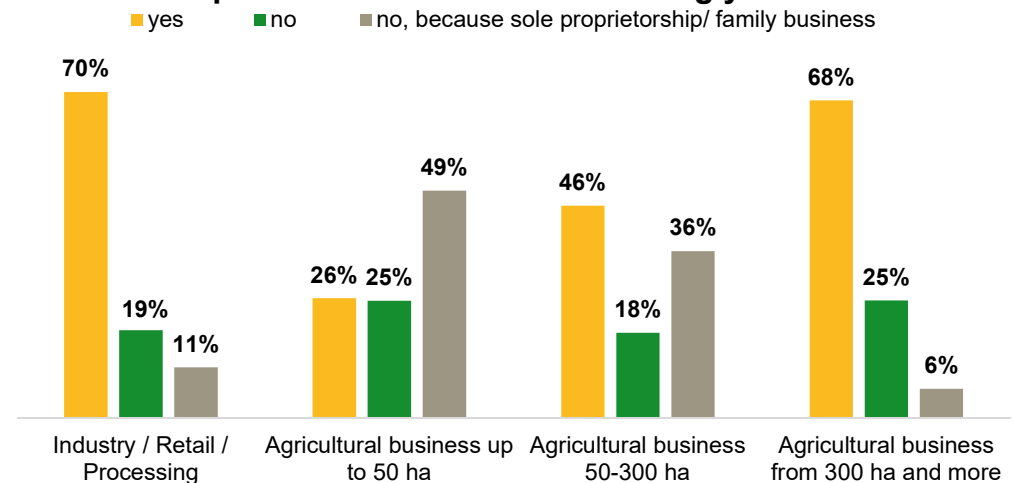
70 % of bigger farms
expect a shortage of skilled workers

39 % of farmers stated that they think the skilled labor
shortage can be addressed by reducing the need for labor
through automation and investment in technology

n = 1384
1003 Germany / 381 international
Agricultural production 668, Industry / Retail / Processing 338

Agrifuture Insights also showed that it is a topic for farmers

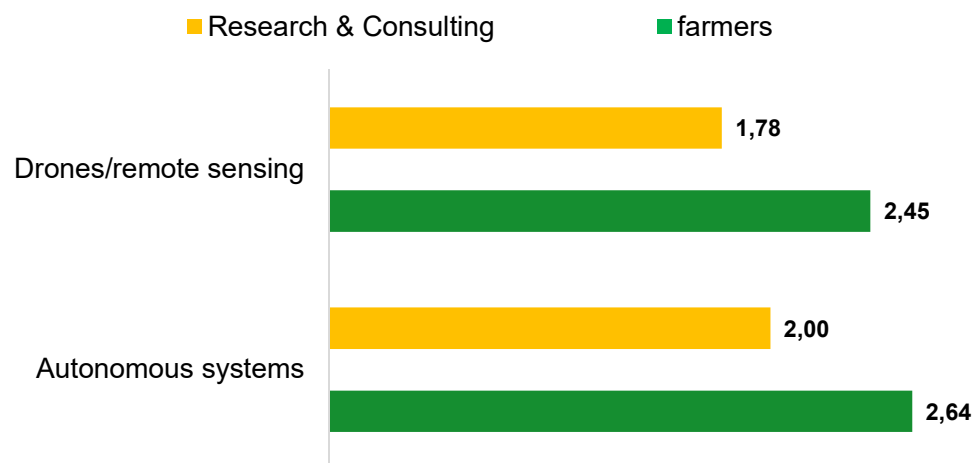
Do you expect the shortage of skilled workers to impact your operation/business in the coming years?



Source: DLG-Agrifuture Insights, n = 2184, survey spring 2025

Robotics and drones as tools to promote sustainable productivity

What relevance will the following technological trends have for your business in the future?



1 = very important, 2 = important, 3 = less important, 4 = insignificant

n = 1079
788 Farms, 101 Research & Consulting

Robotics and Drones conserve resources

- in terms of labor
- use of fertilizers and crop protection product

Example: Drone Seeding

- Faster than conventional tractor-based methods
- Lower CO₂ emissions
- Cover crops can be sown even before the main crop is harvested

Source: DLG-Agrifuture Insights, n = 2184, survey spring 2025

Agricultural Innovation – Insights from DLG Podcasts

Drone Technologies in Agriculture

- Practical Drone Applications
- Used for crop monitoring and precision treatment
- Enables detailed data collection to boost productivity

Drone System Types

- Multirotor and fixed-wing drones
- Each offers specific advantages depending on the farming task

Legal and Regulatory Framework

- Compliance with drone regulations is essential
- Reducing bureaucratic barriers is key to broader adoption

Robotics and Autonomous Driving

Integration of Robotics in Farming

- Robotics Automates routine tasks
- Improves efficiency on farms

Real-World Experiences

- Farmers and experts share insights
- Autonomous machines already in use

Challenges and Support

- Costs, functionality, and regulations pose challenges
- Funding and stakeholder collaboration are essential

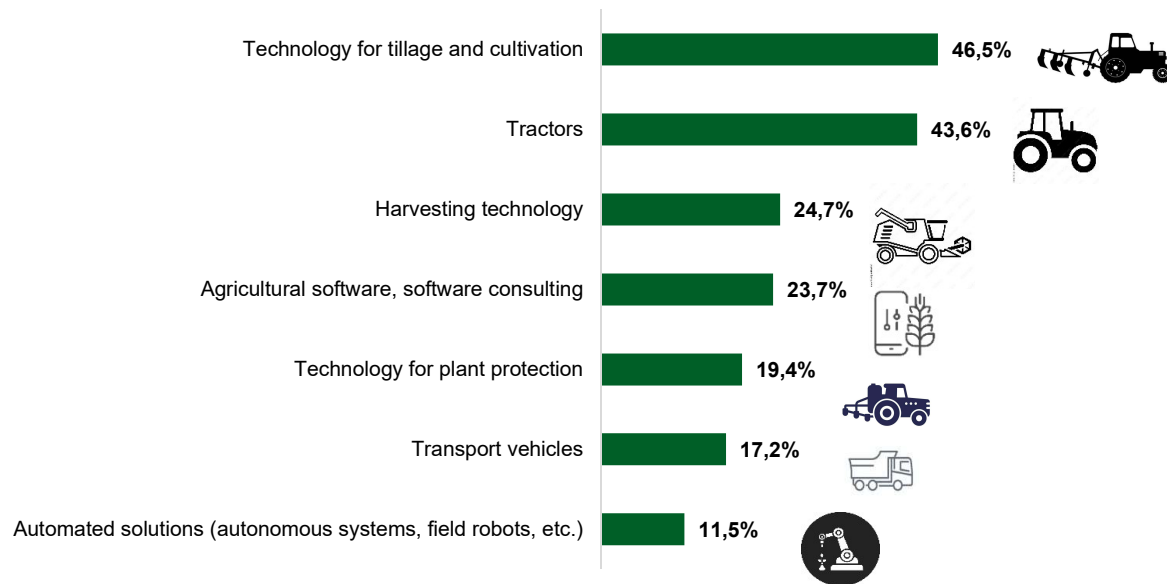
Future of Farming

- Automation reshapes the farmer's role
- Encourages innovation and sustainability through engagement

Listen now:



Areas of investments within the next 12 month



- Software and automated solutions among top investment priorities with rising interest, despite obstacles
- Traditional machinery continues to dominate the market.
- technology for tillage and cultivation is now the leading investment priority
 - Direct seeding might gain increasing interest

n = 628
197 international
Selection of several options possible

Source: DLG-Agrifuture Insights, n = 2184, survey spring 2025

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Conclusions

Agritechnica as a perfect place to

- inform farmers
- bring together stakeholders
- Create ideas
- develop solutions

And therefore create progress in the different possibilities to achieve sustainable increase in productivity



**Many thanks for
your attention**

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Appendix

Methodology of survey

Methodology Agrifuture Insights 2025



Basic information	▪ Respondents are DLG members and participants from the DLG-Network (national and international) ▪ April-May 2025
Methodology	▪ Online Survey ▪ Tool at www.umfrageonline.de
Random sample	▪ Total N = 2,184 Processing of the survey: DLG's Competence Centre for Agriculture and Food



AGRICULTURAL MACHINERY

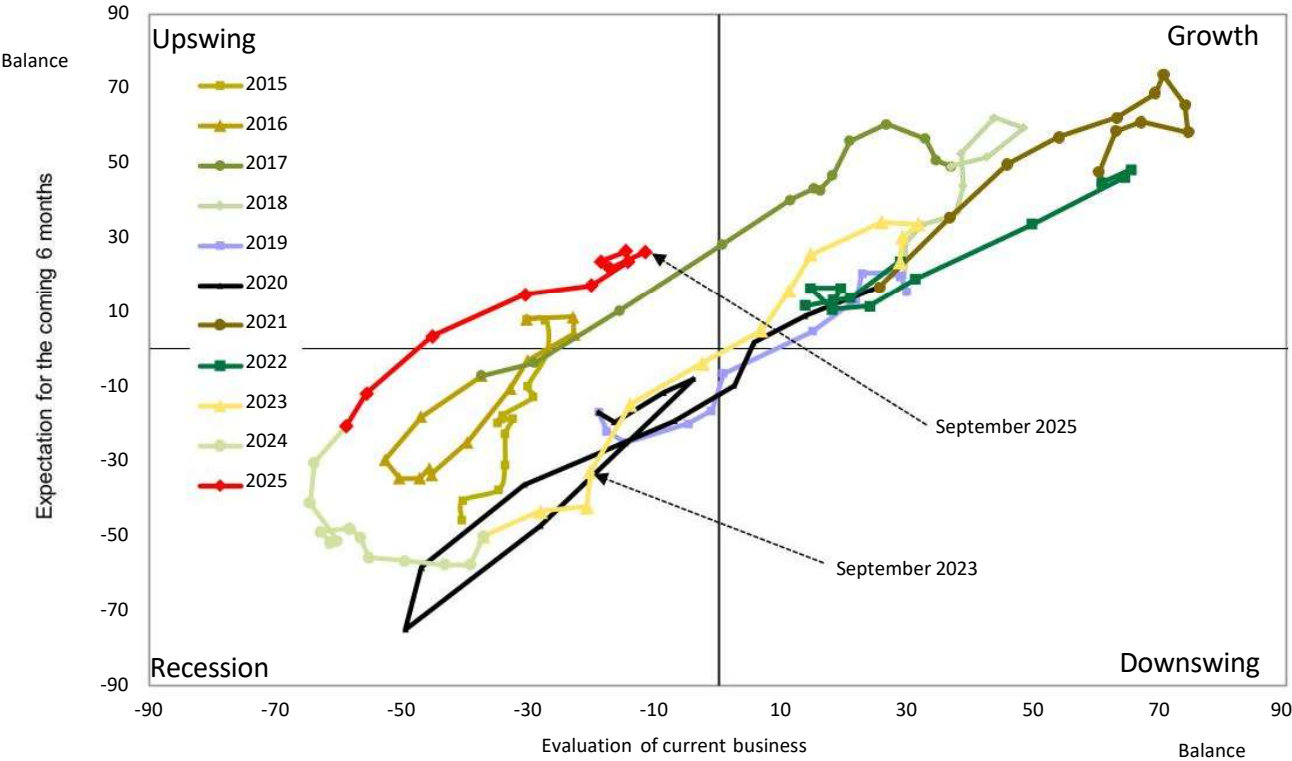
Market and Economic Trends in the Ag Tech Industry

VDMA Information Exchange

SEPTEMBER 22, 2025, DR. TOBIAS EHRHARD

ADVANCING EUROPE'S MACHINERY INDUSTRY

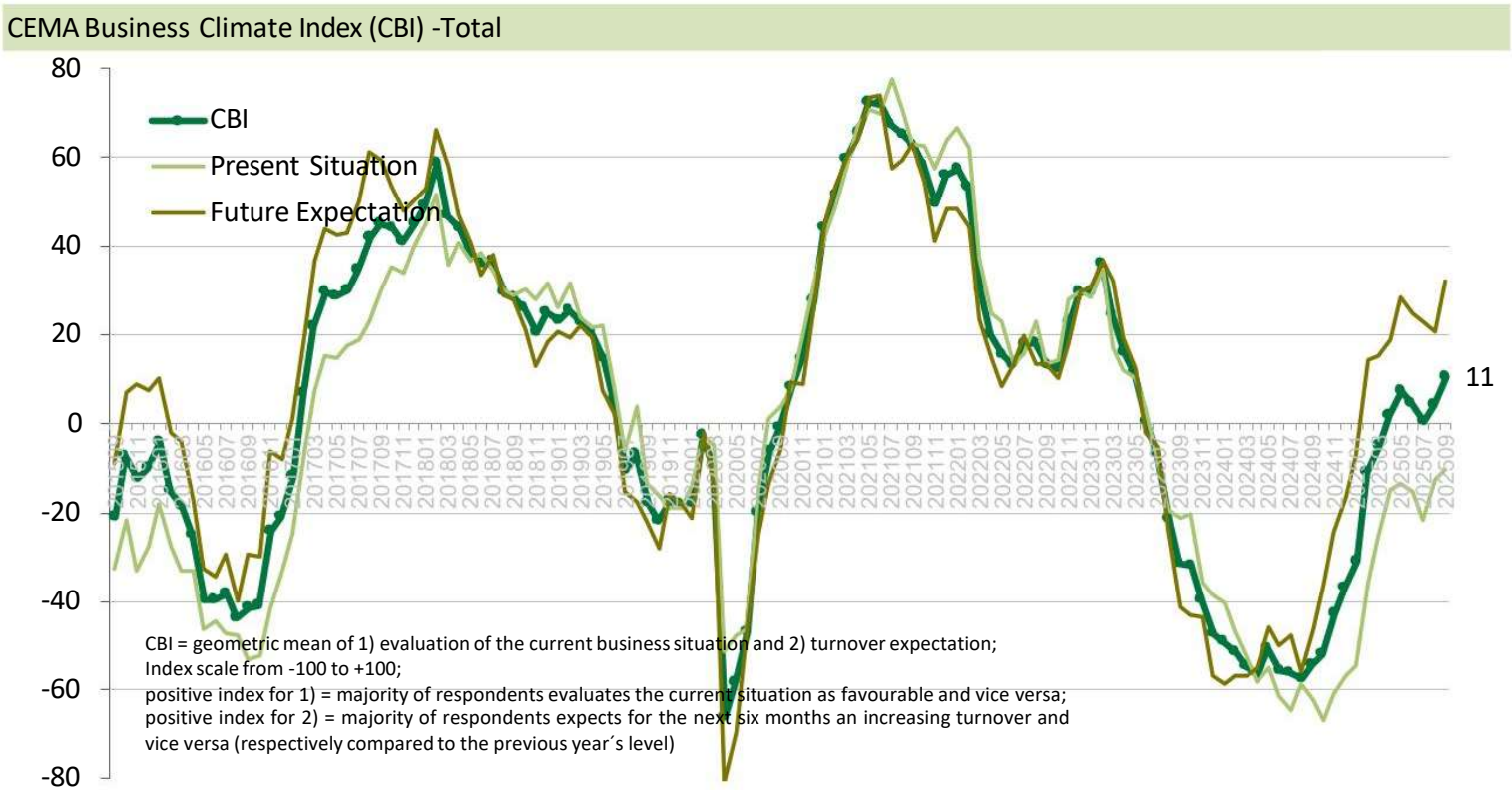
Business climate



Source: CEMA Business Barometer, each value as an average of the last two months

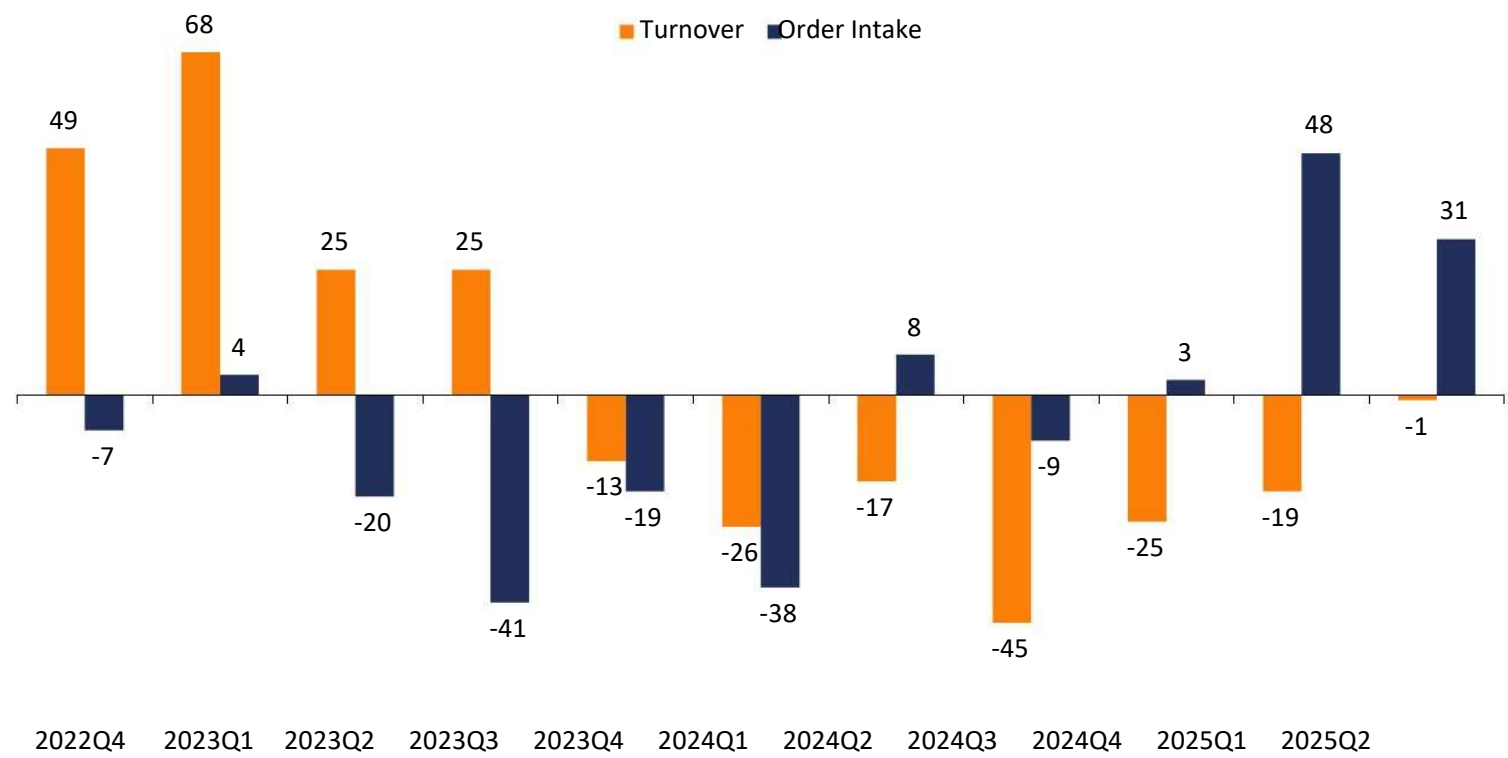
Source: CEMA Business Barometer, September 2025

Business climate



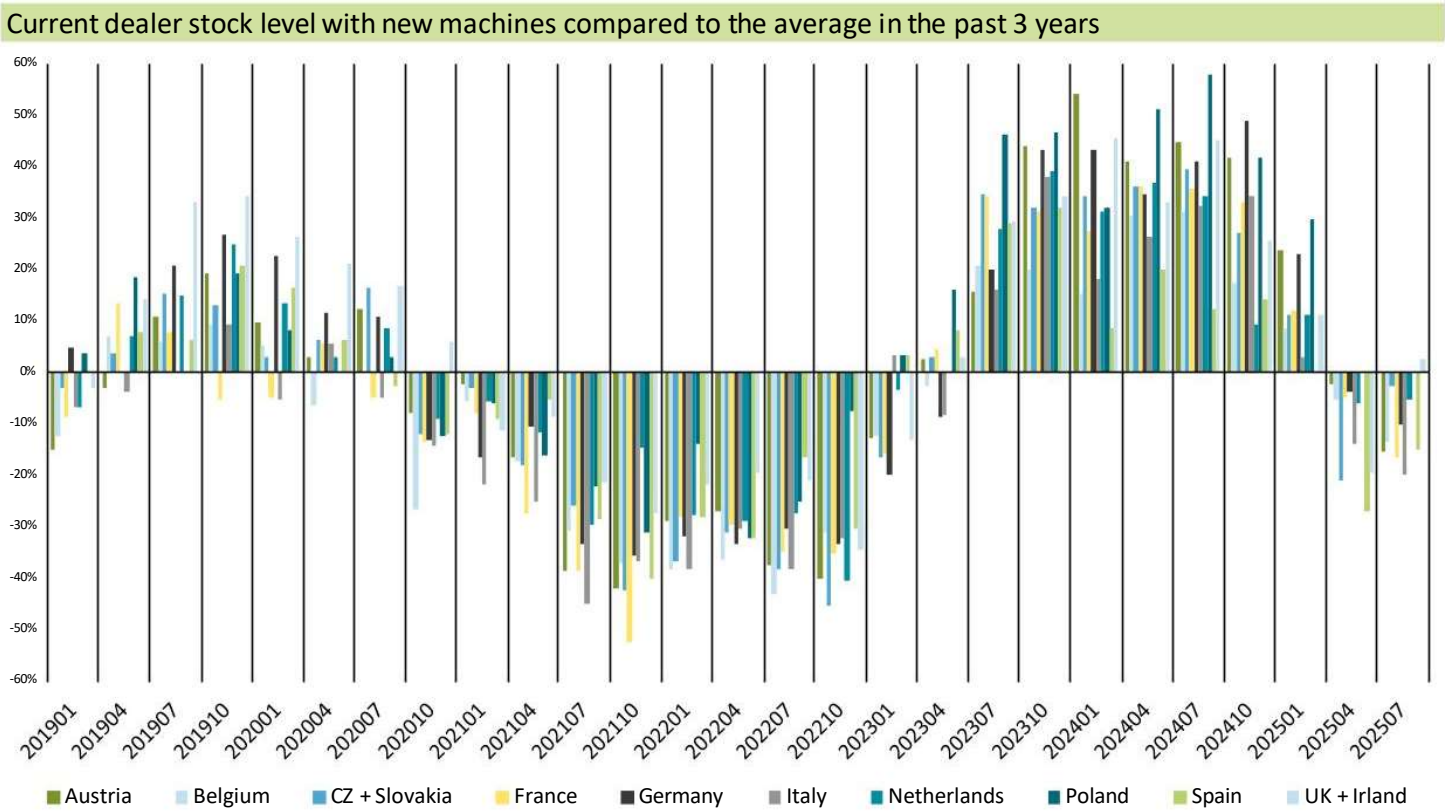
Source: CEMA Business Barometer, September 2025

Turnover and order intake in the last quarters in %



Source: VDMA Agricultural Machinery, September 2025

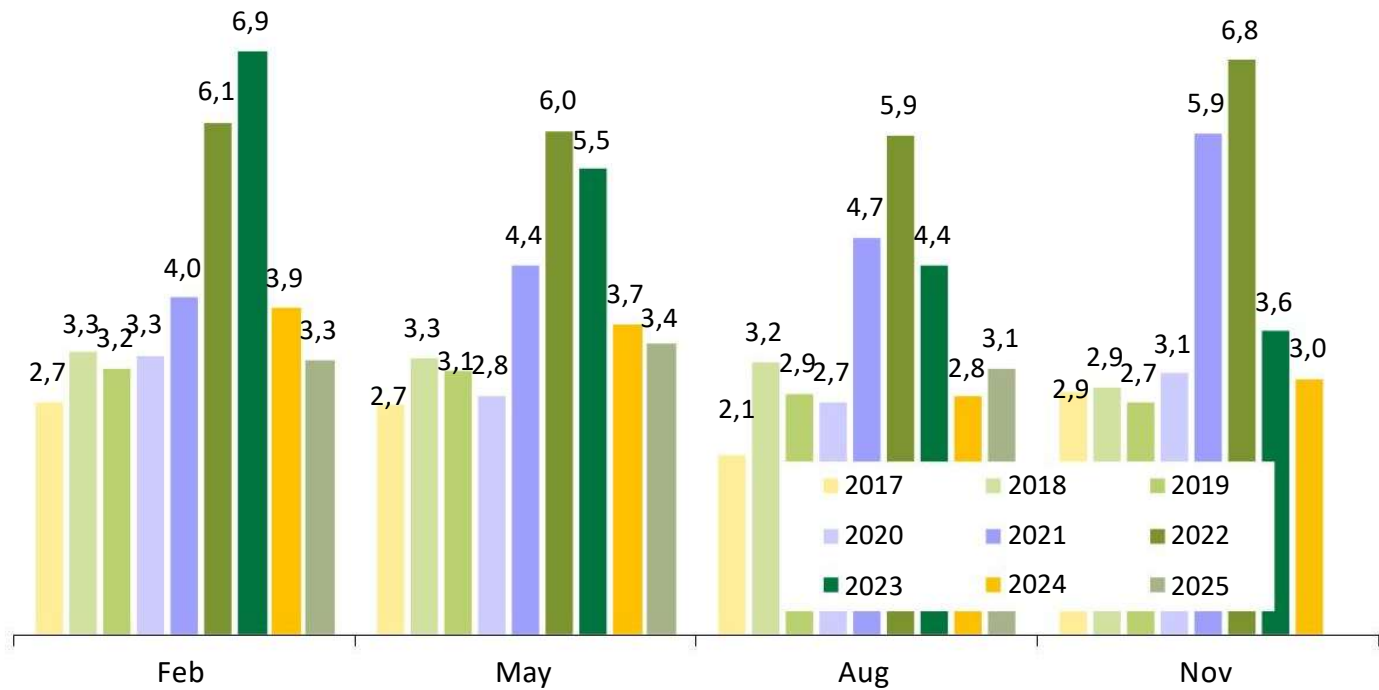
Dealers' stock levels in Europe



Source: CEMA Business Barometer July 2025

Manufacturers' order stock in Europe

Question: Our volume of orders corresponds currently to a production period of ... months.



Source: CEMA Business Barometer August 2025

Critical factors influencing market development

The industry in Europe is back on the upswing, but uncertainties remain and new risks emerge

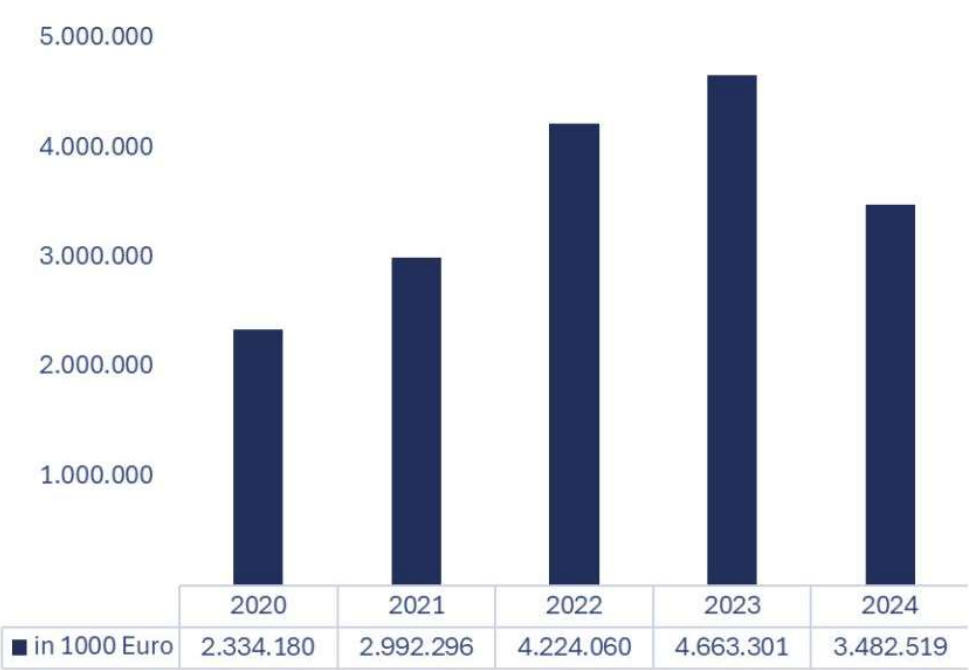
- Producer prices remain low due to strong harvest results
- Geopolitical uncertainties persist
- Protectionist policies back in the spotlight on the world stage
 - Currently in focus: US economic and tariff policy



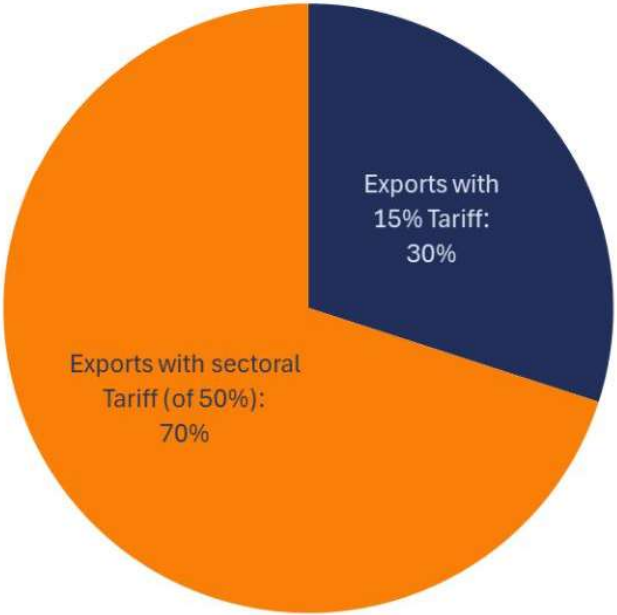
Heavy burden from US import tariffs

- European agricultural machinery industry ranks among top exporters to the USA
- The 15 percent import tariffs imposed in July were by no means the end of the story
- This was followed on August 18 by an increased tariff rate for steel and aluminum products
 - Steel and aluminum components of a machine have since been subject to a 50 percent tariff
 - The assessment basis is the purchase price of the crude steel
 - Unparalleled bureaucracy and cost factor
- Pure distortion of competition

Impact of US tariffs on EU ag-tech exports



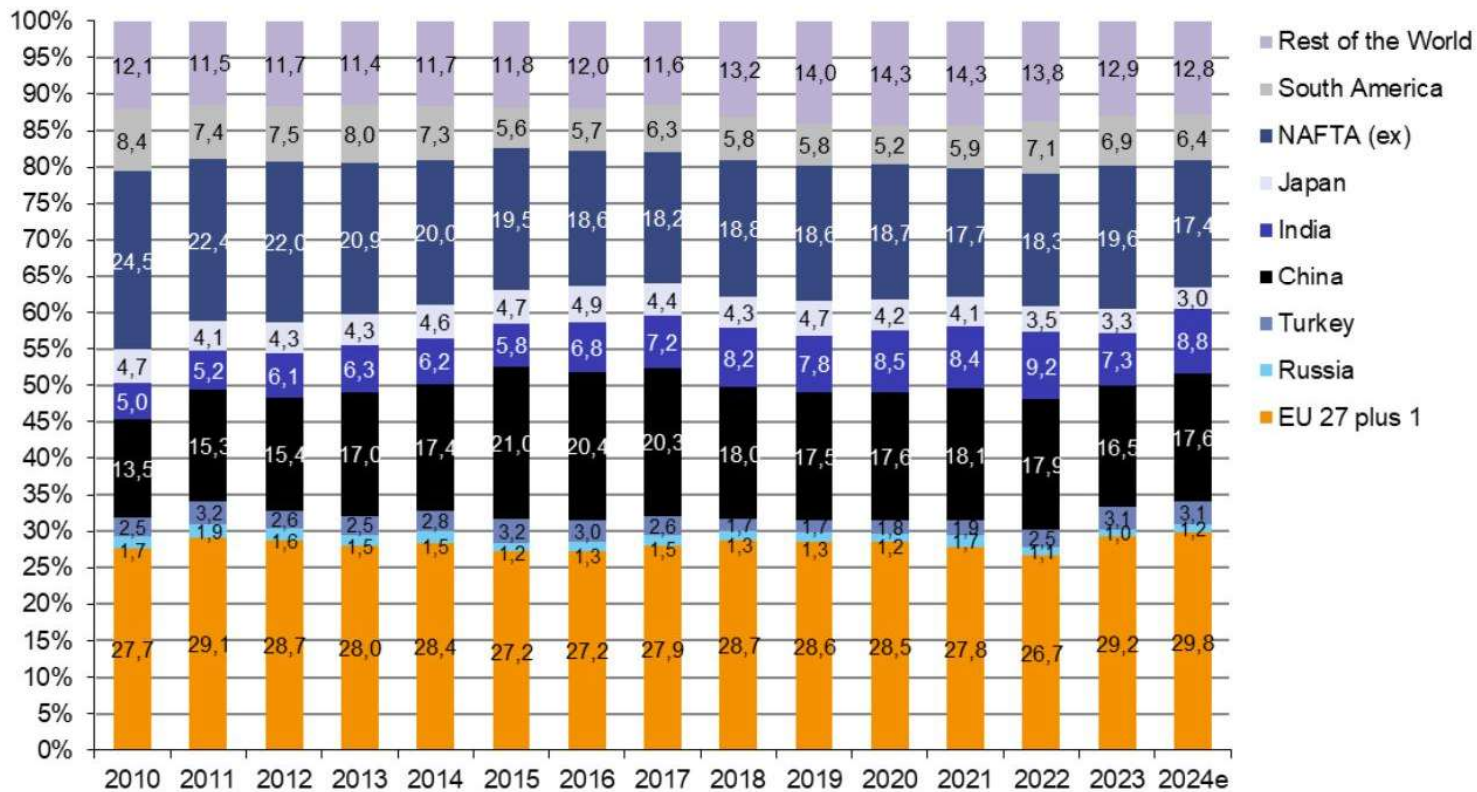
Exports from EU-27 to USA with Sectoral Steel-/Aluminum-Tariffs



Source: VDMA, National Statistical Offices, September 2025

WORLDWIDE PRODUCTION

Worldwide production volume distribution in %



Source: VDMA Agricultural Machinery, August 2025

Europe is the powerhouse of agricultural technology

Europe is the powerhouse of the global agricultural technology community – Agritechnica is its forum

- What we will expect in November in Hanover:
 - Numerous new and further developments in mechanics and hydraulics – i. e. in classic engineering
 - Linked to this: digital, automated and autonomous solutions
 - A win-win for ecology and economy

Thank you for your
attention.

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Dr. Markus Demmel
Chairman of the DLG Innovation
Commission

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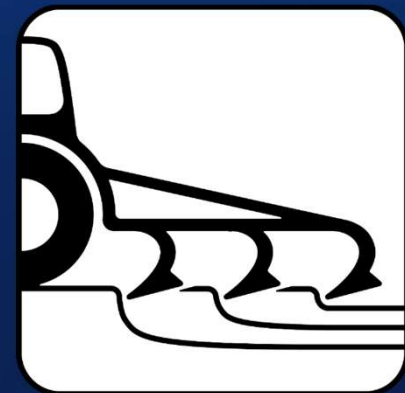
Trends in Tractors

- **Automation, autonomous vehicles:** Increasing integration of autonomous driving systems and smart implements.
- **Alternative drives:** Expansion of hybrid and electric tractor models, plus biofuel compatibility.
- **Smart farming:** Enhanced GPS steering, variable rate technology, and real-time data exchange.
- **Operator comfort:** Ergonomic cabins, improved suspension systems, and climate control.
- **Connectivity:** Full integration with farm management systems and cloud-based platforms.
- **Power and efficiency:** New engine generations with optimized fuel consumption and emissions.
- **Safety Features:** Advanced camera systems, obstacle detection, and rollover prevention.
- **Modular Design:** Customizable configurations for different farm sizes and crop types.



Trends in Tillage and Seedbed preparation

- **Precision Depth Control:** Machines with sensors and automation to ensure consistent working depth across varying soil conditions
- **Reduced Soil Disturbance:** Equipment designed for conservation tillage and minimal inversion to preserve soil structure and moisture
- **Smart Adjustment Systems:** Hydraulic or electric systems for in-cab adjustment of working elements (e.g., discs, tines)
- **Integrated Seedbed Preparation:** Combination tools that perform tillage, leveling, and seedbed firming in one pass
- **Residue Management:** Improved incorporation and distribution of crop residues to support soil health and next-season sowing
- **Sustainability Focus:** Designs reduce fuel consumption and support regenerative farm practices



Trends in Drilling and Sowing

- **Combination of work steps, especially sowing and fertilization:** Reaction to climate change and optimal fertilizer allocation and distribution
- **Application of variable seed rates:** Adaptation of seed rates to soil quality and yield potential
- **Joint sowing of different crops:** Following requirements of regenerative agriculture
- **Focus on the “right” ridge shape:** Especially for crops like potatoes, manufacturers offer a wide range of rigid and rotating ridge-forming elements to optimize the final ridge structure
- **Digital and sensor-based systems:** Across all machinery categories, there's a clear trend toward **sensor-controlled automation**, **optical systems**, and **IoT integration**, which also applies to seedbed preparation and sowing



Trends in Fertilization Technology

- **Manure application continues to move toward low-loss, precise, and needs-based nutrient application:** Manufacturers are developing lighter machines with high impact, improved drag shoe and drag hose distributors, and alternative systems.
- **Site-specific application continues to gain importance:** Section control remains a key element for efficient manure application.
- **Maximum precision is also the focus when applying mineral fertilizers:** Centrifugal spreaders become more and more automated
- **Digital Integration:** Fertilization is increasingly managed through **sensor-based automation, optical systems, and IoT platforms, allowing for more accurate and efficient nutrient application**
- **Sustainability Focus:** Emphasis on reducing input use and avoiding losses — key goals in modern fertilization strategies.



Trends in Crop Protection Technology

- **Precision application:** Technologies enabling targeted use of crop protection products to reduce input costs and environmental impact.
- **Sensor-based systems:** Real-time detection of weeds, pests, and diseases using cameras and AI.
- **Data integration:** Linking crop protection tools with farm management systems for better decision-making.
- **Regulatory pressure:** Innovations driven by stricter EU regulations and demand for sustainable practices.
- **Optimization of mechanical weeding:** Increasing interest in non-chemical solutions and integrated pest management.
- **Connectivity and remote control:** Smart sprayers and systems that can be monitored and adjusted remotely.



Trends in (Grain)Harvesting

- **Continuing and improved automation:** Increasing harvesters and driver-assist systems to improve efficiency and reduce labor dependency.
- **Sensor-based quality monitoring:** Real-time data collection during harvest to support precision farming and post-harvest analysis.
- **Gentle crop handling:** Innovations aimed at minimizing crop damage, especially in high-value crops. Supported by automation.
- **Data connectivity:** Integration of harvesting equipment with farm management platforms for seamless data flow.
- **Modular and adaptable designs:** Machines tailored to different crop types and field conditions.
- **Safety Features:** Advanced camera systems, obstacle detection, and rollover prevention.



Harvesting Machinery – Segment-Specific Trends

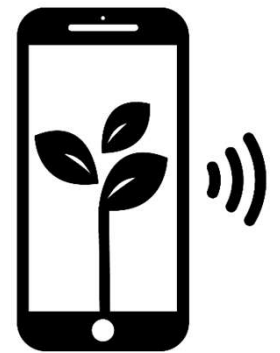
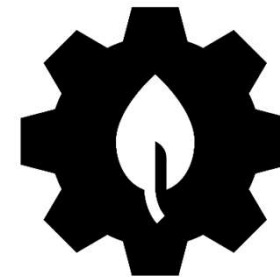
- **Lifting (Potatoes, Beets)**
 - Gentle handling and cleaning systems
 - Depth control and soil separation
 - Modular designs for varied conditions

- **Chopping including forage**
 - High-throughput chopping and baling systems
 - Precision cutting and crop flow control
 - Monitoring of dry matter and chop length
 - Logistics and sustainability focus



Trends in Digital Technologies

- **AI and machine learning:** Used for predictive analytics, crop monitoring, decision support systems, optimized automation, ...
- **Optimized image analysis:** Supported by AI and fast and cheap processors for many applications
- **Connectivity and interoperability:** Emphasis on seamless data exchange between different systems and brands
- **Digital twins and simulation:** Virtual models of fields and machinery for planning and optimization
- **Remote sensing and satellite data:** Enhanced monitoring of crop health, soil conditions, and field variability
- **User-friendly interfaces:** Simplified apps and dashboards tailored to farmers' needs and workflows.



Agritechnica 2025 Innovation Award Winners

2 Gold medals
22 Silver medals
234 world premieres



Gold Medal Winner 2025



■ Line Traction

Müller Landmaschinen GmbH

Joint development with Aebi & Co. AG Maschinenfabrik

The completely new 'Line Traction' drive concept developed by Müller Landmaschinen together with Aebi & Co. AG Maschinenfabrik replaces the previously usual longitudinal and transverse differentials with a hydrostatic system in the planetary final drives. For the first time, this enables each wheel to be driven at the correct speed when cornering, which vastly improves traction and significantly increases safety at the critical limits.



Category: Tractors, mobile loading equipment, transport technology



Gold Medal Winner 2025

- Overall concept of a 70 t big baler
CLAAS

The concept of a 70 t big baler that has been completely redeveloped by CLAAS is designed for a combination of high throughputs with constantly high bale densities and secure binding, and establishes entirely new performance dimensions for this machine type.

Category: Machinery and equipment for chopping, mowing, conditioning and baling of mowed material



Agritechnica 2025 Innovation Award Winners Silver



Categories: Tractor, transport, tillage and seed preparation

- **DEUTZ-FAHR TAGS - Tractor Assisted Guidance System**

SAME DEUTZ-FAHR DEUTSCHLAND GmbH
Joint development with Stereolabs

- **Predictive, completely adaptive drivetrain management system for stepless tractor gearboxes**

CLAAS

- **GRIMME Go-Clean concept: easy and safe cleaning for rotary tillers**

GRIMME Landmaschinenfabrik GmbH & Co. KG

- **LEMKEN iQblue Fan Automation and automated fan control**

LEMKEN GmbH & Co. KG



CM2

check pic

Conlong, Malene; 20.09.2025

Category: Fertilization technology

- VarioSmart

RAUCH Landmaschinenfabrik GmbH

- ZA-TS 01 AutoSpread

AMAZONEN-WERKE H. DREYER SE & Co. KG

- Bioselect RC 250

BÖRGER GmbH Drehkolbenpumpen



Category: Crop protection

- **SMART-HILL**

Einböck GmbH

Joint development together with CLAAS E-Systems

- **Proactive BoomControl**

HORSCH Maschinen GmbH



Category: (Grain)Harvesting

- Yield EyeQ

Carl Geringhoff Vertriebsgesellschaft mbH & Co. KG

- Schumacher EasyCut3 (EC3) QuickFit cutting system

SCHUMACHER GmbH

- New Holland Corn Header Automation

New Holland



Categories: potato, chopping, forage harvesting

- RICONDA – patented sieve web with unique, wear-resistant and maintenance-free connection system

GRIMME Landmaschinenfabrik GmbH & Co. KG

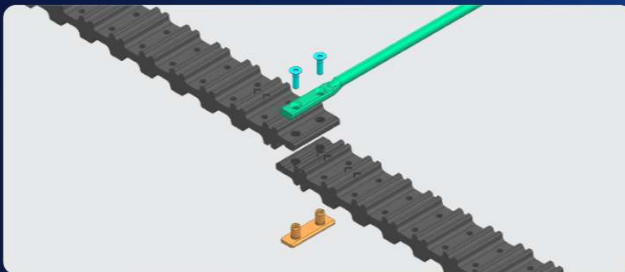
Joint development together with Ricon GmbH & Co. KG

- KRONE OptiSet on the KRONE Vendro

Maschinenfabrik Bernard Krone GmbH & Co. KG

- JAGUAR 1000 overall concept

CLAAS



Category: Chopping – same principle

- CEMOS AUTO CHOPPING, automatically controlled grain processing based on AI-supported CSPA real-time analysis

CLAAS

- ForageQualityCam

Fendt - AGCO GmbH

- ForageCam

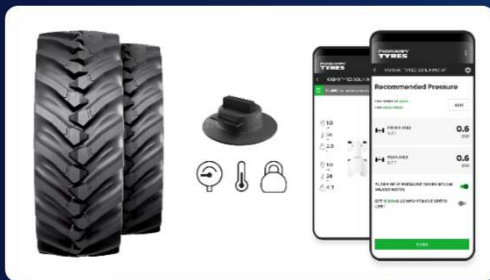
New Holland

Joint development together with KU Leuven, Mebios Biophotonics



Category: Digital Systems

- Intuitu Smart Pressure Assistant for Nokian Tyres Soil King VF tyres
NOKIAN HEAVY TYRES Ltd.
- EasyMatch – fertiliser recognition by means of AI
AMAZONEN-WERKE H. DREYER SE & Co. KG
- FERTIEYE – smartphone image analysis for fertiliser spreader adjustment under field
SKY AGRICULTURE.
- DUXALPHA
Arnold NextG GmbH



Agritechnica 2025 – with 234 registered world premieres



Dont miss the full list of 234 world premiering innovations distributed across the 23 halls!

We look forward to your visit at:

Agritechnica
9-15 November 2025
Hannover, Germany



Thank you for your attention.

QUESTIONS?

INTERNATIONAL PRESS CONFERENCE 2025 - Organizational Information



Lunch

- 12:30 p.m. – 1 p.m.

VDMA Exhibitor Preview

- Monday: 1 pm – 6 pm, Tuesday: 8 a.m. – 1 p.m
- Face-to-face discussions with leading exhibitors at the trade fair as part of a compact 'speed dating' format (information exchange)

Press Center at AGRITECHICA 2025

- Location: Convention Center
- Opening Times: 8 a.m. – 6 p.m.

New

- With the AGRITECHNICA ticket you can travel free of charge on local transport (ÜSTRA) on the days of your visit