

AGRITECHNICA 2025

Milestones for Sustainable Productivity Growth

**Dr. Lothar Hövelmann
Chief Executive Officer - CEO
DLG**



Main influencing factors in global agriculture



Price development – wheat and soybean

Milling wheat, Euronext Paris, in €/t



Soybean, CBoT, in US-Cent/bushel



big harvest of grains and oilseeds 2025 - rising prices unlikely

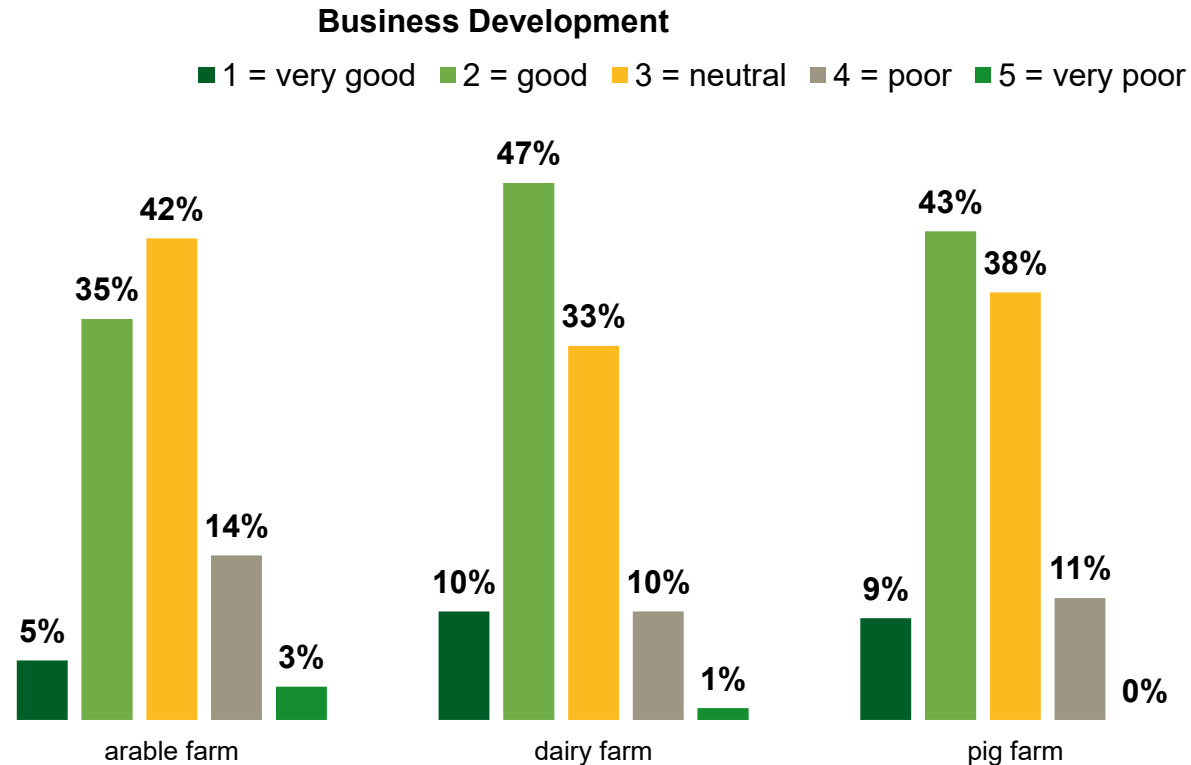
rising input costs

stagnant or declining producer prices

environmental protection requirements

political and societal expectations

Economic expectations



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

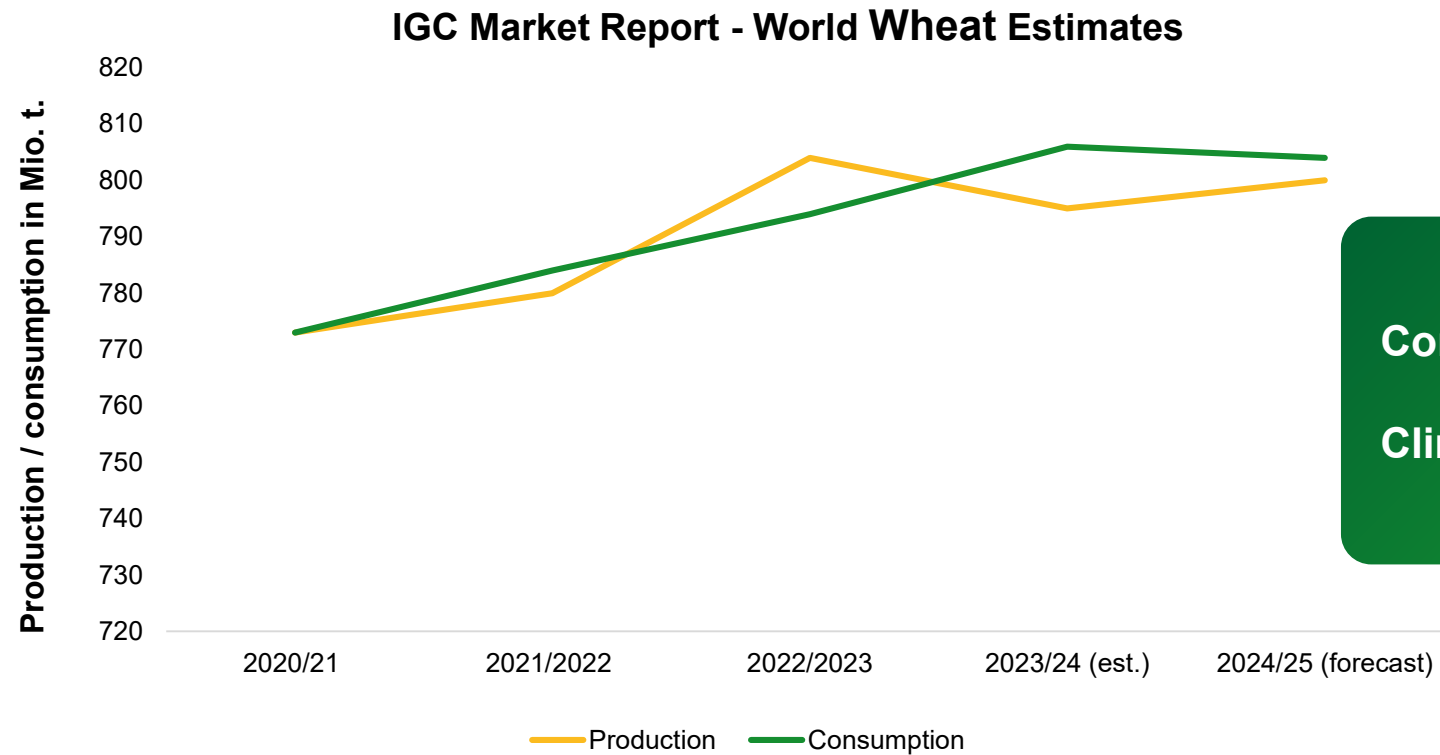
40 % of arable farmers
expect a good or very good
business development

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



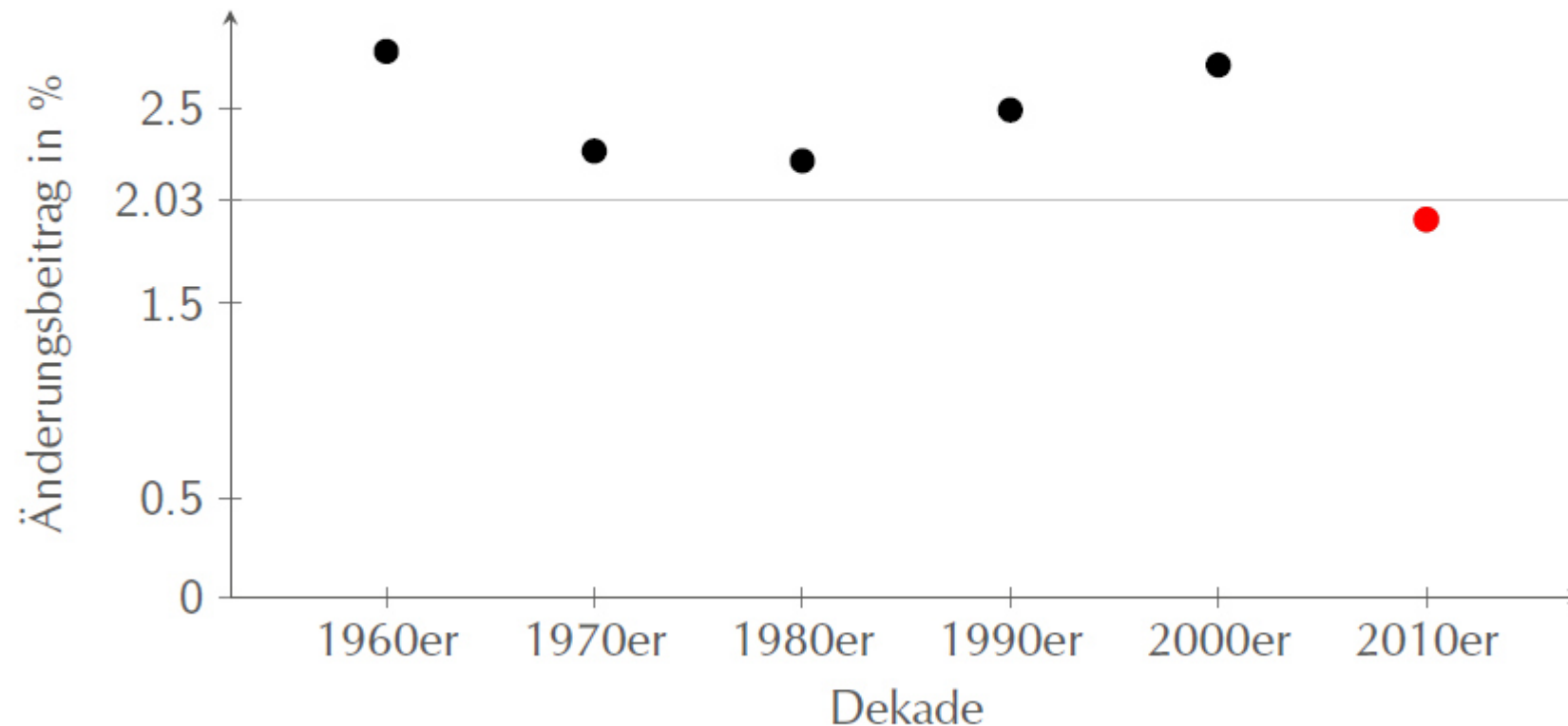
Consumption higher than production

Climate change → stable harvests uncertain

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

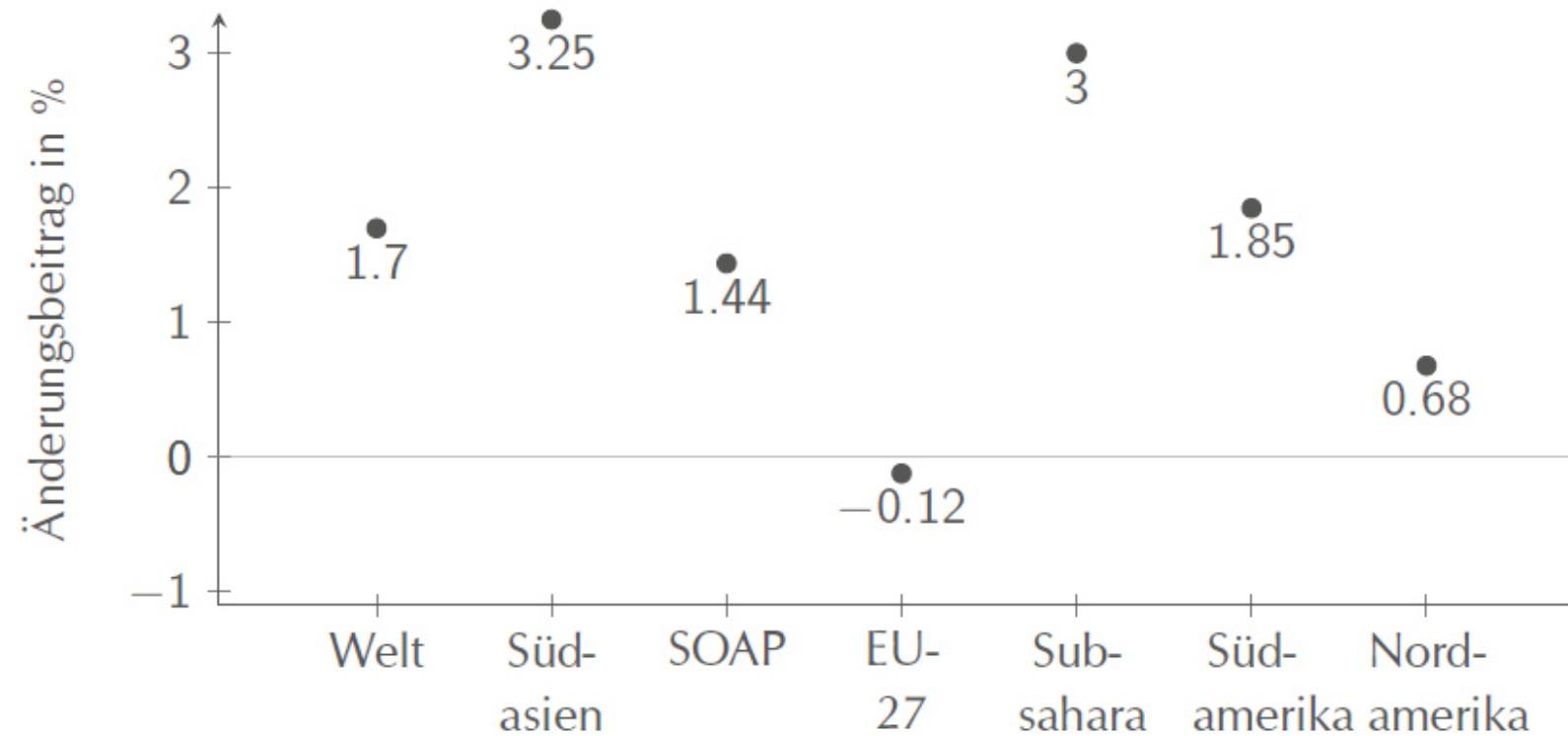
Global growth of agricultural production 1960-2020

Globales Wachstum der Agrarproduktion 1960-2020



Global growth of agricultural production 2013 - 2022

Globales Wachstum der Agrarproduktion 2013-2022



Sustainable productivity growth – key-solution!

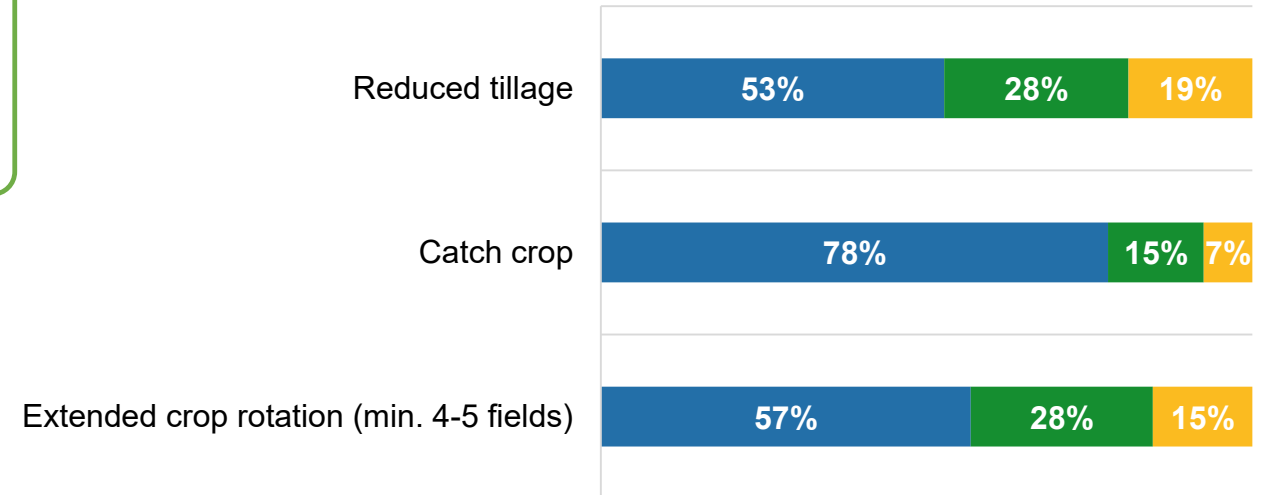


Spotlight Soil health – classics of arable farming

- Soil management and soil health is growing focus for farmers
- Farmers regard catch crops, extended crop rotation and reduced tillage as preferred vehicle for soil health



■ 1 = already implemented ■ 2 = planned ■ 3 = insignificant

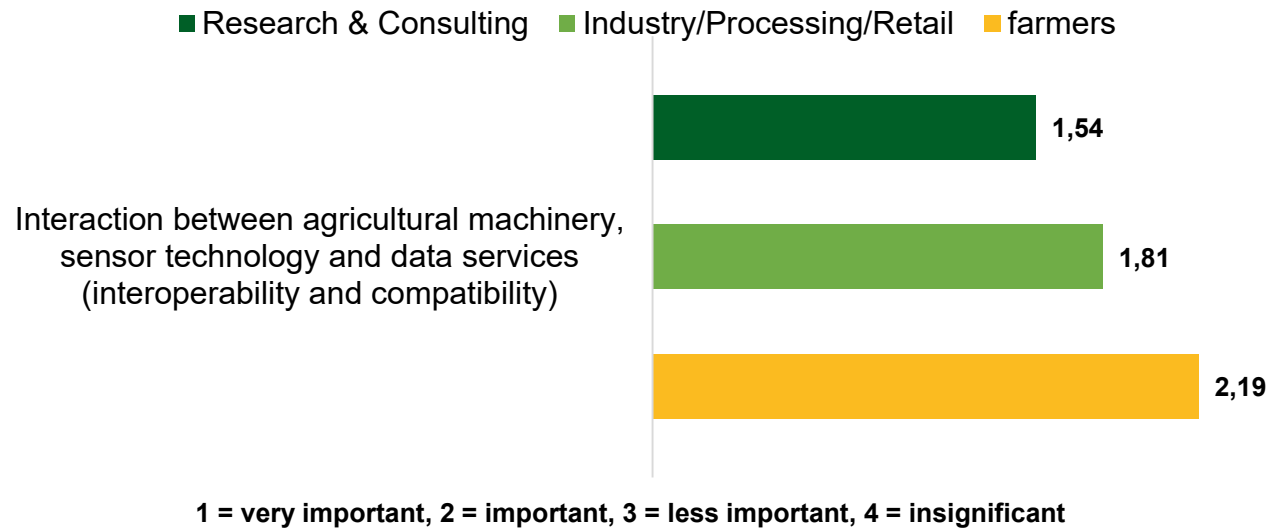


Spotlight Soil health

- Regenerative Agriculture
- Crop Rotation
- Minimal soil disturbance
- Soil biodiversity
- Permanent ground cover and living roots
- Management of soil organic substance

Digitalisation key factor for productivity growth

Importance of Digitalisation for future business



n = 1079

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

Farmers < Industry < 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

- **Central hub for digitalization at the trade fair:** artificial intelligence, autonomy, robotics and drones will be presented in a bundled format.
- **Provide impetus** to make the digital applications of different manufacturers compatible with each other
- Barriers shall be overcome by dialogue between farmers, manufacturers and scientists

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:

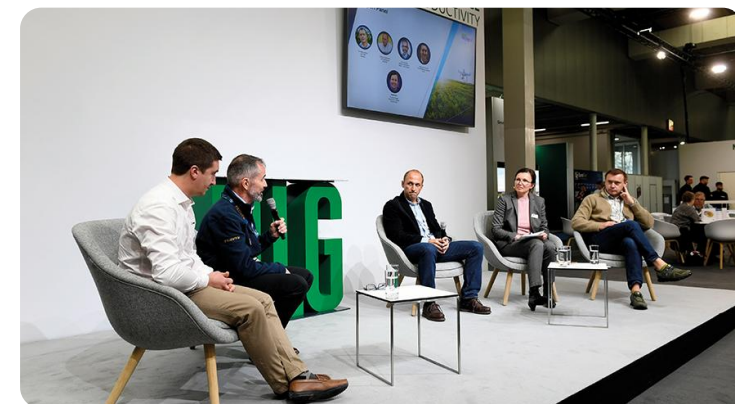
- Live demonstrations of seamless networking between farm management systems and agricultural machinery

Platform for exchange:

- Experts and innovators gathered in one place

Presentations and panel discussions on:

- **“Practitioner hour”** – Farmers report on their digital experiences
- Autonomy, robotics, drones
- data protection, cybersecurity, and system resilience
- Integration of diverse data sources and using AI for data evaluation



Perfect place to accelerate digital adoption

Shortage of skilled workers

Growing difficulty in recruiting labor and higher labour costs

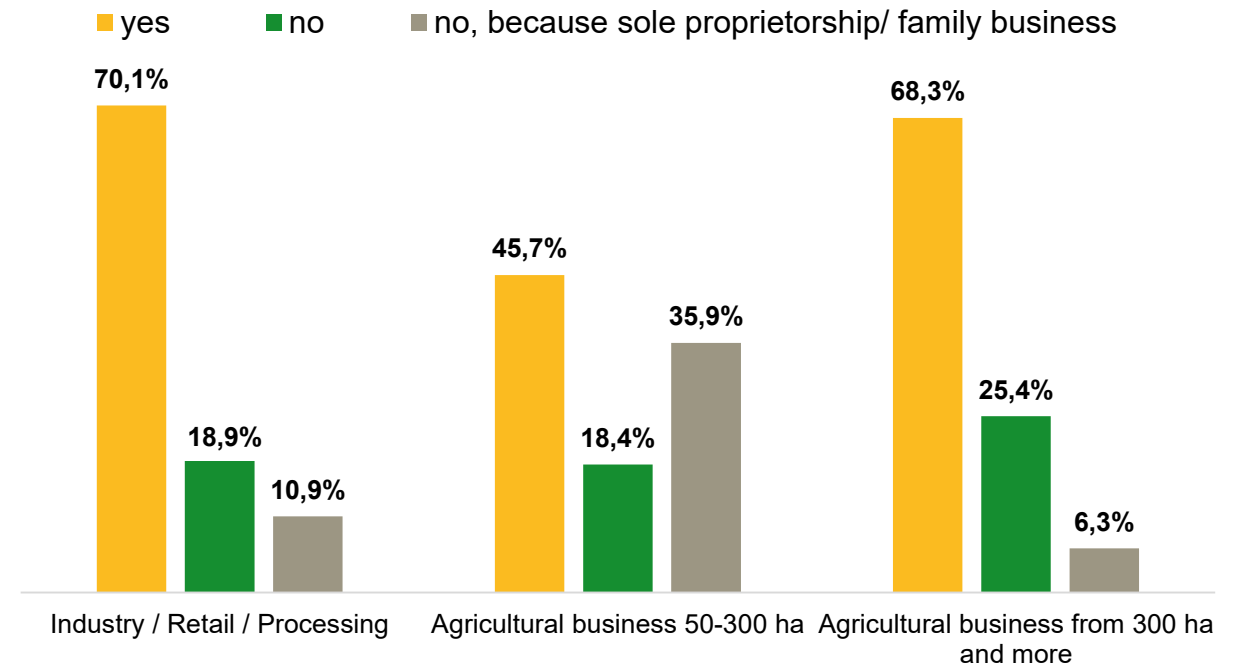
- rise in demand for robotics

70 % of bigger farms
expect a shortage of skilled workers

39 % of farmers think it 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

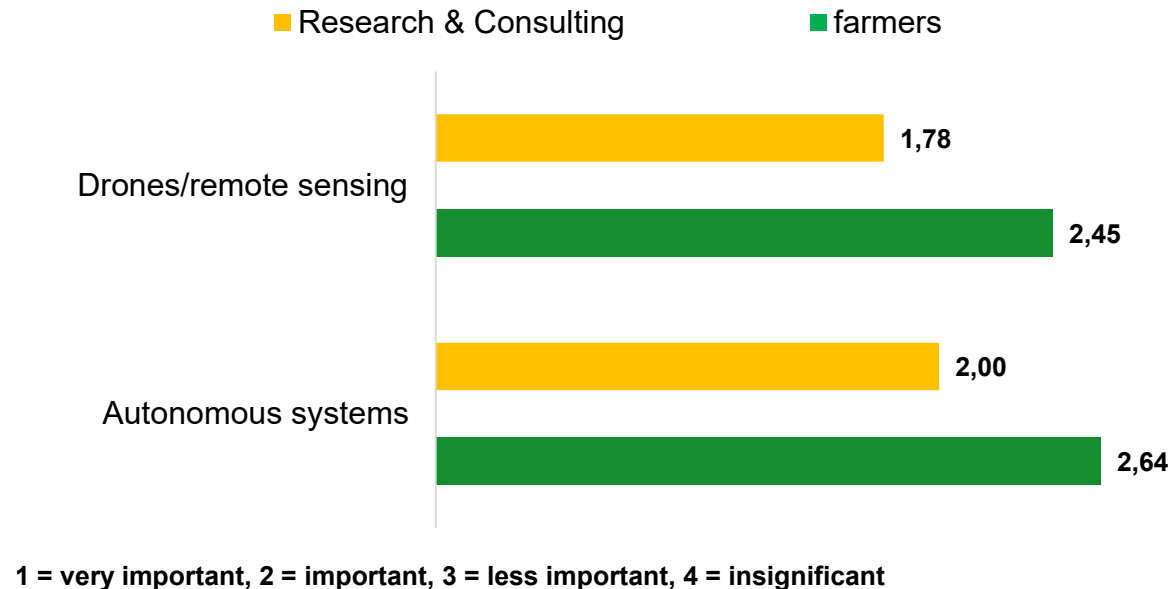
Do you expect the shortage of skilled workers to impact your operation/business in the coming years?



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?



n = 1079
788 Farms, 101 Research & Consulting

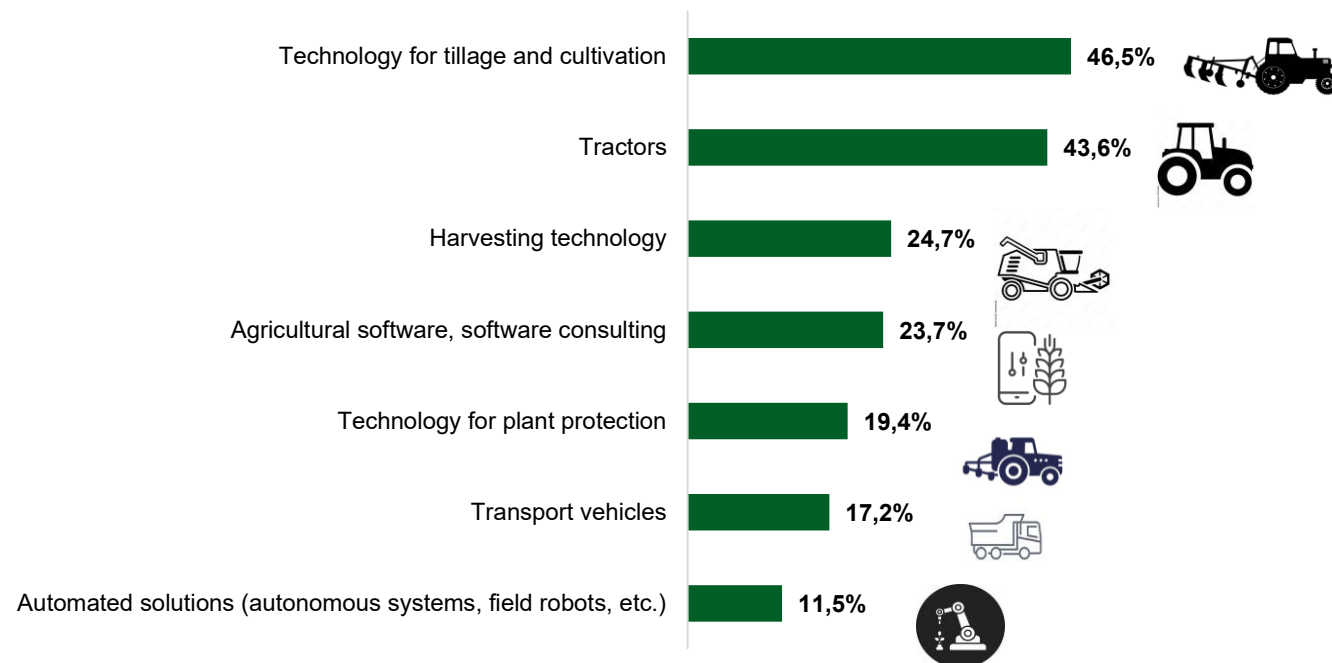
Robotics and Drones conserve resources

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

Areas of investments within the next 12 month



- Software and automated solutions among top investment priorities – with a rising trend
- Traditional machinery continues to dominate the market
- Technology for tillage and cultivation now leading investment priority

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

n = 628
197 international
Selection of several options possible

AGRI TECHNICA^{DLG}

THE WORLD'S NO. 1

touch smart
efficiency

9 – 15
NOVEMBER
HANOVER
GERMANY | 20
25



Top Issues
Top Trends
Top Technology
Top Experts



**Many thanks for
your attention**

Media contact

DLG e.V. - Communications and Marketing
Eschborner Landstr. 122 • 60489 Frankfurt/M.
Tel.: +49(0)69/24 788-203

Agrifuture Insights contact

DLG e.V. Competence Center Agriculture & Food, Kerstin Hau
Eschborner Landstr. 122 • 60489 Frankfurt/M.
Tel.: +49(0)69/24 788-375

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