

# PRECISIONAG™

## 2014 OUTLOOK FOR PRECISION AGRICULTURE MARKETS

**A look ahead to 2014 for retailers and those marketing  
precision ag equipment and services**

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## The FieldScripts effect ripples across agriculture

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Monsanto's move into precision technology – more specifically, hybrid-centric seed planting recommendations along with its acquisition of Precision Planting – has had a deep impact across a number of fronts in agriculture. The 2013 pilot program in Iowa, Illinois, Minnesota and Indiana has come off well, with split trials pitting “traditional” planting recommendations and planter technology against Monsanto recommendations.

There are 30 retailers and 150 growers in the program. Still, the true proof will be in the yield response this fall. Monsanto plans to expand the program in the four pilot states in 2014. Retailers who will be new signees in 2014 are already in training and gathering grower data. And there are still some key issues – most importantly, how retailers will extract hard dollar benefits from the program should the expansion ramp up quickly (which would require more manpower, training, etc.). Other noticeable impacts on precision players include:

- **Data movement/storage/aggregation.** At InfoAg 2013 there were a number of startups and relatively new companies selling solutions for moving data wirelessly from cab to cloud to computer, with the grower in full control. Offering an alternative to Monsanto's requirement that growers submit a substantial amount of data to generate FieldScripts prescriptions. There are also more meaningful discussions about who owns the data, and what level of control growers can/should maintain, and what return is great enough that growers would turn data over to a manufacturer or anyone else.
- **Growers.** The silent majority of growers is waiting-and-seeing on FieldScripts, but if FieldScripts delivers on its promise it seems likely that growers would give FieldScripts serious consideration.
- **Consultants.** Most are concerned by the possibility that “black box” recommendations might be the way of the future for seed selection and placement. Retailers have told us that it would be great to be able to take the guesswork out of the hybrid selection/planting technology side of the planting plan.
- **Crop protection.** With Monsanto fully into the precision game, the crop protection industry seems to have a more substantial interest in precision ag.

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## **New equipment releases in decline**

The number of new releases in precision equipment – receivers, displays, and controllers – has continued to decline sharply. There were no major releases of new hardware in these categories at InfoAg 2013, and only one major new high-end release so far this year (the Raven Viper 4, a tablet-inspired cab display).

## **Total farm management solutions are on the rise**

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Trimble, Case, Deere, and AGCO have continued to work on web-based, total farm management software solutions to win the hearts and minds of growers, although there have been minimal updates from the companies on their progress, or even specific goals. (These include Deere's FarmSight, Trimble Connected Farm, AGCO Fuse, and Case's AFS.) AGCO did recently announce Fuse, which will umbrella-brand their technology offerings across their myriad farm equipment brands, a move that's been well received, and Deere and Case have held major dealer and media events. The industry concern is that these solutions will continue to be too proprietary to become a "majority adopted" technology.

## **The iPad and the rise of simplicity**

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The proliferation of iPads and the improvement of mobile computing technology and available bandwidth are influencing product development – and may in fact be the reason why new in-cab display development has slowed. Manufacturers trying to match this high bar of simplicity and intuitive design will necessarily take longer to develop new products. Some have simply employed iPod apps, but so far they are mostly "bring-along" technology and have not served as a replacement for the in cab display.

## **Precision and fertilizer regulations**

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Precision technology and techniques are seen as a key part of the solution to reduce fertilizer runoff through sensors, tissue testing, rapid soil nitrogen testing, etc. It's also a great story to tell to the public about the advancement of agriculture in general.

## **More "precision ag specialists"**

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Another InfoAg observation was the proliferation of attendees with the title "precision ag specialist." Lots of folks were there to find out "what's going on in precision," and there were organizations with significant contingents walking the floor.

## Rise of the drones

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There were a half-dozen drone manufacturers and a ton of interest in unmanned aerial vehicle (UAV) technology. Canada has adopted protocol that allows commercial drone use in ag, but in the US this is still being debated. A UAV association (AUVSI) exhibited at InfoAg and is putting some effort toward moving the needle on drones in ag.

### ABOUT PRECISIONAG

*PrecisionAg* is a diversified, independent media enterprise serving the global community using precision agriculture techniques – adjusting production inputs and practices based on in-field variability, typically through use of geographic positioning systems (GPS) and other technologies. Offerings include the PrecisionAg Buyer's Guide, PrecisionAg Special Reports, the PrecisionAg Institute, the PrecisionAg Giveaway, PrecisionAg WORKS, and the websites PrecisionAg.com and PrecisionAgNetwork.com.

PrecisionAg corporate headquarters are located in Willoughby, OH, in the Cleveland metro area where its parent company, Meister Media Worldwide, was founded in 1932.

### ABOUT MEISTER MEDIA WORLDWIDE

Meister Media Worldwide, headquartered in Willoughby, Ohio, provides integrated media solutions for worldwide specialized agriculture. A leader in the industry, the company provides information and networking opportunities to global markets, including fruits and citrus, vegetables, cotton, ornamental horticulture, precision agriculture, plant protection and Latin American agriculture. Founded in 1932, Meister Media Worldwide now produces 13 regular magazines, along with eNewsletters and more than 20 websites, as well as trade shows and exchange events. In addition, Meister produces custom print products, web development, videos and strategic business development services. Contact us at [www.MeisterMedia.com](http://www.MeisterMedia.com).

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