agri benchmark Cash Crop
Understanding Agriculture Worldwide

Global Forum 2012, South Africa

Yelto Zimmer, Coordinator of agri benchmark Cash Crop

Global Partners: syngenta, ufop, JOHN DEERE
Content

1. What is *agri benchmark* Cash Crop?
2. *agri benchmark* Outputs
3. Benefits to Partners
Understanding global Agriculture

Independent, Non-political, Non-profit
Provides scientifically sound and relevant Basis for Decision Makers in Policy, Industry and Farming
Coordination by vTI (public funded research) and DLG
Understanding Production Systems...
Cost of Wheat Production ($/t)

Ukraine

...and farm economics & markets

Top 5 Corn Exporters
Present in all major Countries and Crops

Crop coverage:
- Corn
- Soybeans
- Wheat
- Sugar beet
- Rice
- Rapeseed
- Oats
- Rye
- (Malting) barley
- Sunflower
- Sorghum
- Cotton
- Peas
- Beans
- Palm oil

Pipeline:
- Sugar Cane

Countries participating in *agri benchmark* Cash Crop
Priorities for new countries
# agri benchmark – Partners (I)

## Europe

<table>
<thead>
<tr>
<th>Country</th>
<th>Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>Lantmännern</td>
</tr>
<tr>
<td>Italy</td>
<td>CRPV</td>
</tr>
<tr>
<td>France</td>
<td>ARVALIS</td>
</tr>
<tr>
<td>Denmark</td>
<td>CERES</td>
</tr>
<tr>
<td>Sweden</td>
<td></td>
</tr>
<tr>
<td>Ukraine</td>
<td></td>
</tr>
<tr>
<td>Romania</td>
<td></td>
</tr>
<tr>
<td>Bulgaria</td>
<td></td>
</tr>
<tr>
<td>Hungary</td>
<td></td>
</tr>
<tr>
<td>Czech Republic</td>
<td></td>
</tr>
<tr>
<td>Poland</td>
<td></td>
</tr>
<tr>
<td>Russia</td>
<td></td>
</tr>
</tbody>
</table>

## North America

<table>
<thead>
<tr>
<th>Country</th>
<th>Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>Agriculture and Food</td>
</tr>
<tr>
<td>USA / North Dakota</td>
<td>USA / Iowa</td>
</tr>
<tr>
<td>USA / Kansas</td>
<td>USA / Wyoming</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
agri benchmark – Partners (II)

South America

- Brazil
- Argentina / Uruguay

Asia

- China
- Malaysia
- Vietnam
- Kazakhstan
- Thailand
- Japan

Africa

- Tunisia
- South Africa
- Morocco
- Algeria

Transoceania

- Australia
agri benchmark – Global Commercial Partners

- Syngenta: Crop Protection
- John Deere: Machinery
- UFOP: Rapeseeds
- DLG: Growers
agri benchmark –
Cooperations with Public Institutions

European Commission

FAO
agri benchmark Conference in Denmark: Crop Production under Environmental Restrictions

7th agri benchmark Cash Crop Conference, Middelfart (DK), June 13th - 17th 2011
A typical farm…
- represents the origin of a major share of the national output in a given crop
- is defined by a certain production system and a combination (if any) of enterprises
- has certain structural features re. ownership of land as well as labor organization (family vs. hired)
- is regularly being re-assessed to track changes

A standard operating procedure (SOP) to define typical farms was developed and is used by all partners involved.
How and where typical Farms are selected – Example Germany

Hot spots in wheat production

Share of wheat acreage in total arable land (in %)

- < 5
- 5 - 10
- 10 - 15
- 15 - 20
- 20 - 25
- 25 - 30
- 30 - 35
- > 35
Data on Cropping Systems – Example: Malting barley in Western Australia

AU4000WB* - barley (malt) after wheat

- Seeding
- Harvest
- Nitrogen (min/org)
- Phosphorus (min/org)
- Potash (min/org)
- Other Nutrients (min/org)
- Herbicides
- Fungicides
- Insecticides
- Other Pesticides
- Irrigation
- Lime Spreading
- Other Tillage
- Seedbed preparation
- Transplanting
- Stubble tillage
- Plowing
- Swathing
Quality is Key for us

(1) Partner as the source of data are known in the public – their reputation is at risk.

(2) Conference is used as a sound board – partners have to explain to the network the “how’s and why’s”.

(3) Internal data cross check – it takes about 2 days per farm annually to agree on data provided to Center.
Content

1. What is *agri benchmark* Cash Crop
2. *agri benchmark* Outputs
3. Benefits to Partners
A few selected Analysis

1. On-farm competition between corn and wheat
2. Drivers for the strong growth of rapeseed in Eastern European countries?
3. High sugar prices – driven by high commodity prices?
4. Why is Latin America growing so fast in soybeans?
5. Economics of land acquisition?
Beyond Status Quo Data: The *agri benchmark* Focus Group Concept

1. Scientific partners establish focus groups with growers and advisors.

2. We provide group with background information and scenario calculations for assumed changing framework conditions (f.e. a certain price or policy scenario).

3. Scientist is guiding the group to develop and evaluate options for growers to adopt to changing framework conditions / technology options.
agri benchmark Research Projects

1. Competitiveness of global biofuels in the EU based on the EU legislation re. GHG balances
2. Cost of environmental regulations inside and outside the EU
3. Competitiveness of Ukrainian agricultural holdings
4. Perspectives for marginal dryland farming in Europe
5. Supply elasticity in EU sugar beet production
6. Perspectives of global wheat production
Recent initiatives of *agri benchmark* to further increase relevance

1. Build-up data base for transport and logistics (aim: calculate cif-cost)
2. Develop a special unit for smallholder production / developing countries
3. **Regionalized** crop production data base
   * Yields
   * Acreage
   * Gross margins (under construction)
Content

1. What is *agri benchmark* Cash Crop
2. *agri benchmark* Outputs
3. Benefits to Partners
Value to Commercial Partners (I)

1. Reference point for defining status quo of global farms in terms of
   (a) main production systems
   (b) economics of crops & rotations

2. Option to cross-check information from national organizations

3. Experienced and reliable network to run identify/verify growers needs

4. Network to run “what-if-Projects” with growers and advisors to test concepts.
Value to Commercial Partners (II)

5. Have **first-hand information** about outcomes of *agri benchmark* research projects

6. Option to set-up PhD projects for specific needs

7. Annually a one-day **in-house workshop** on recent developments and results
Knowledge is our Business

Thank you for your interest in *agri benchmark*

**Dr. Yelto Zimmer**
- Head of *agri benchmark* Cash Crop team -

Institute of Farm Economics
Johann Heinrich von Thünen-Institute
Bundesallee 50, 38116 Braunschweig

phone +49-531-596-5155
mobile +49-173-5722723
e-mail yelto.zimmer@vti.bund.de
internet www.agribenchmark.org
www.bw.vti.bund.de