



Institute of Farm Economics

***agri benchmark* Cash Crop Understanding Agriculture Worldwide**

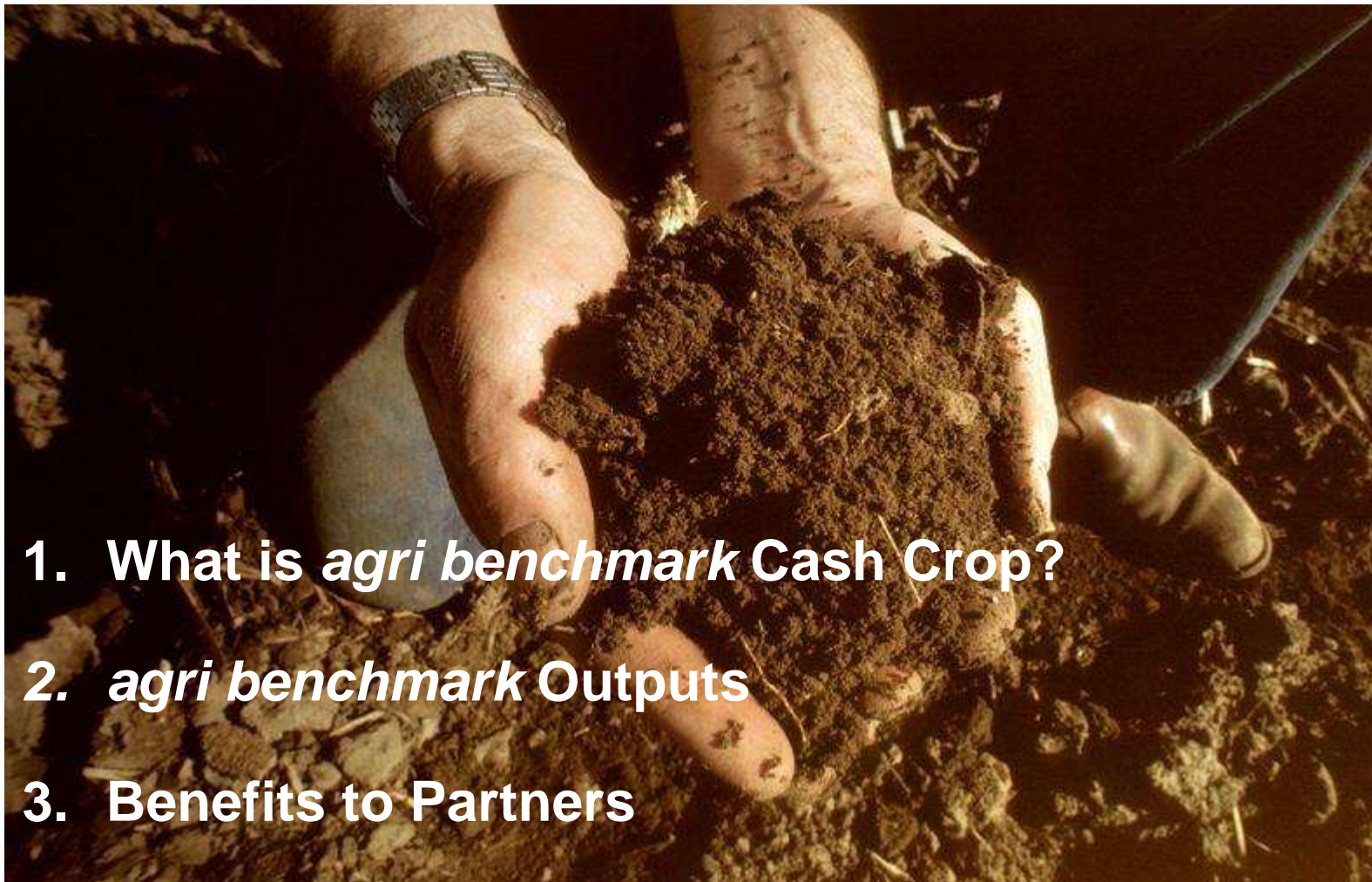
Global Forum 2012, South Africa

Yelto Zimmer, Coordinator of *agri benchmark* Cash Crop

Global Partners:



Content



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

The background image is a photograph of a vast, flat agricultural field, likely a grain field, stretching to a distant horizon under a pale, overcast sky. The field is filled with green crops, and the horizon line is low, emphasizing the expanse of the landscape.

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

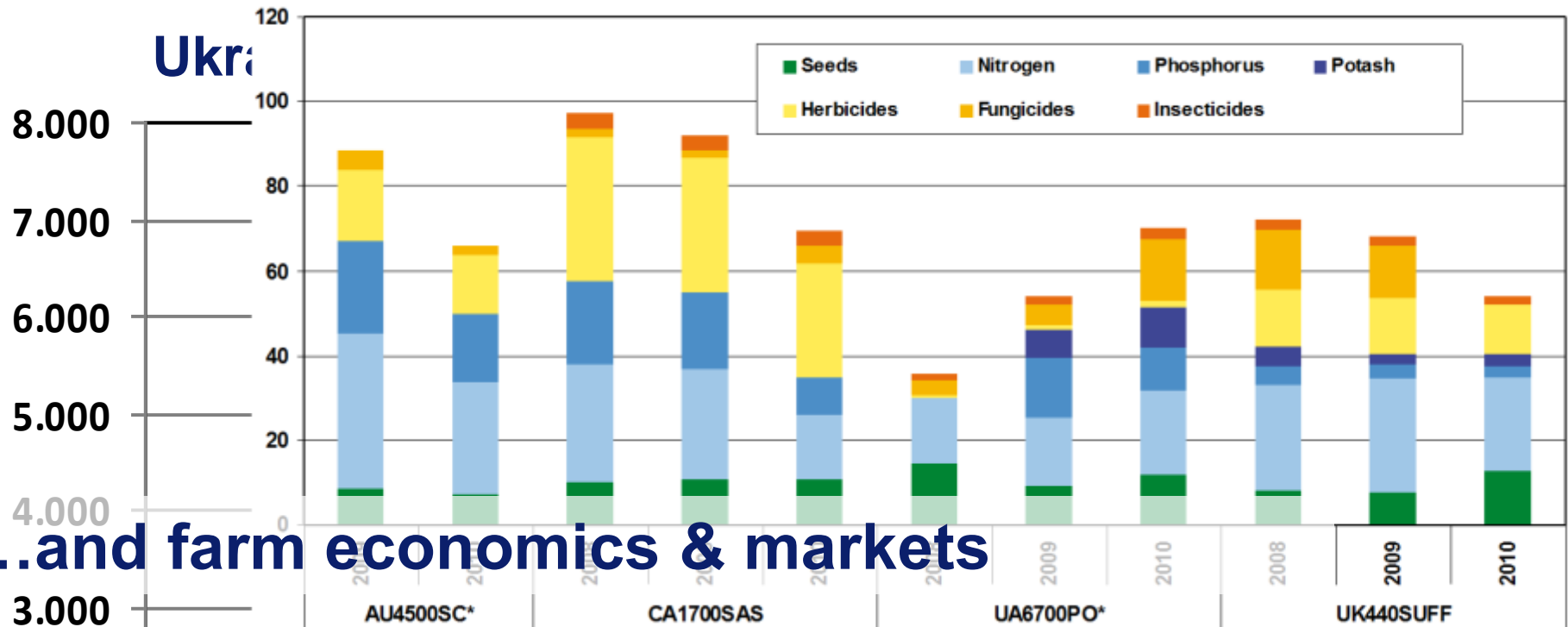


Understanding Production Systems...

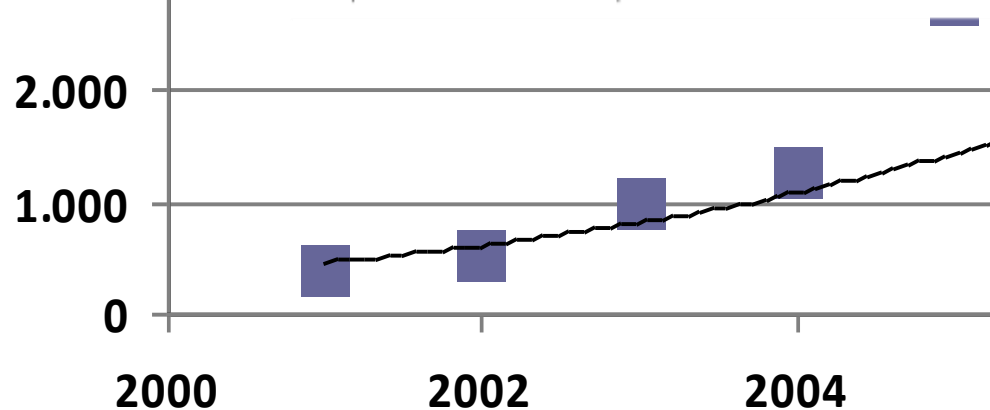


Cost of Wheat Production (\$/t)

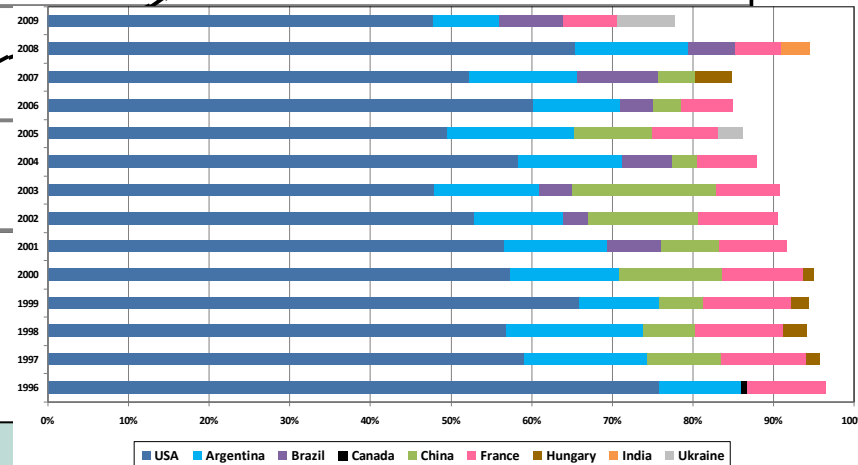
Ukraine



...and farm economics & markets



Top 5 Corn Exporters



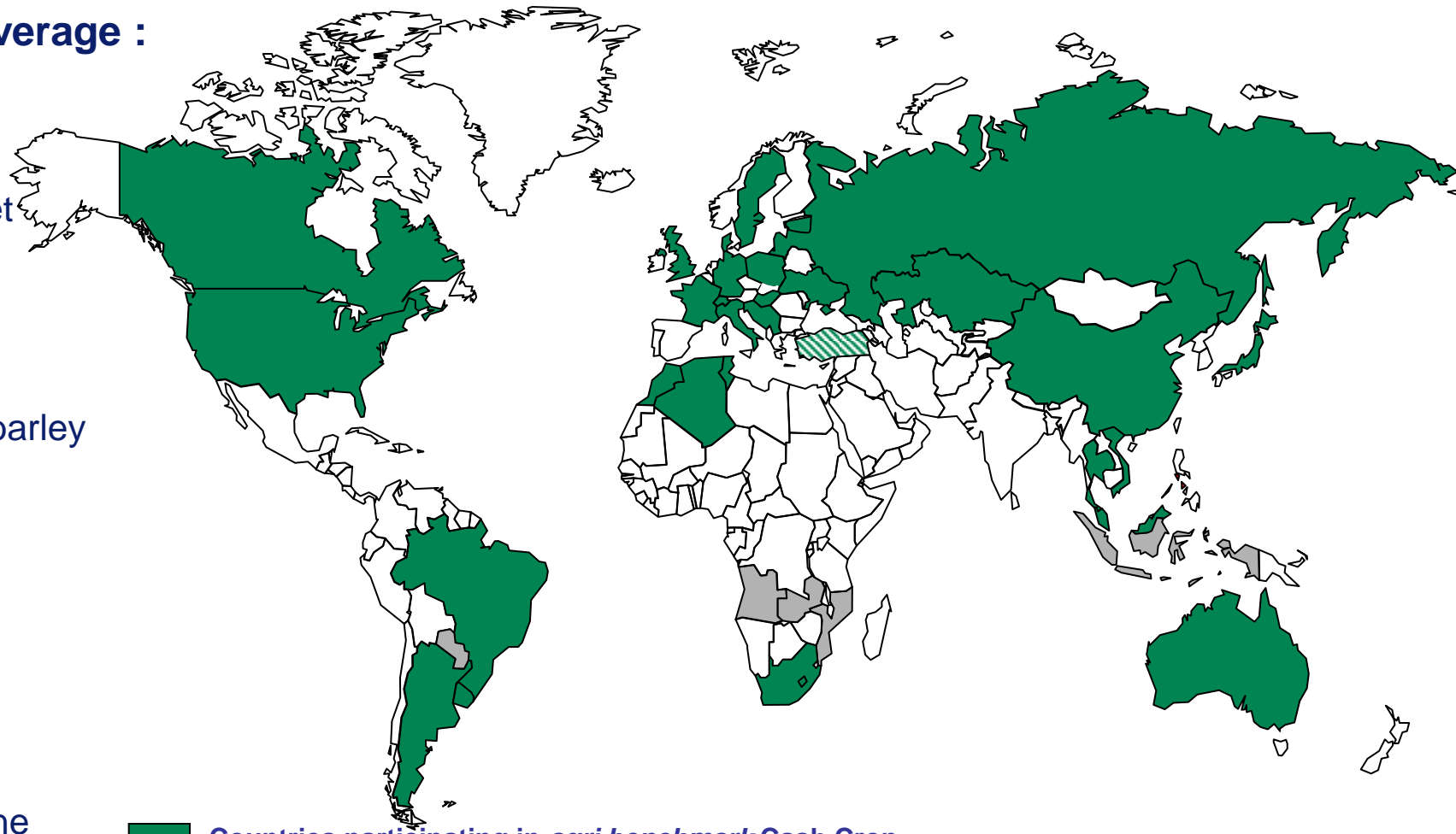
Present in all major Countries and Crops

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

	UK		Sweden		Hungary
	Italy		Ukraine		Czech Republic
	France		Romania		Poland
	Denmark		Bulgaria		Institute for Agricultural Market Studies Russia

North America

		Canada		USA / Iowa
		USA / North Dakota		USA / Kansas

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



Crop Protection



Machinery



Rapeseeds



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



Kathrin Strohm
Biofuels



Tanja Möllmann
Internal Coordination



Yelto Zimmer
Head



Thomas de Witte
Biogas



Simon Walther
Ukraine / Holdings

agri benchmark Cash Crop Centre Team



Stefan Ellsiepen
Logistics



Raphael Albrecht
Sugar Beets



Janina Krug
Marginal Land

agri benchmark Farms - established systematically

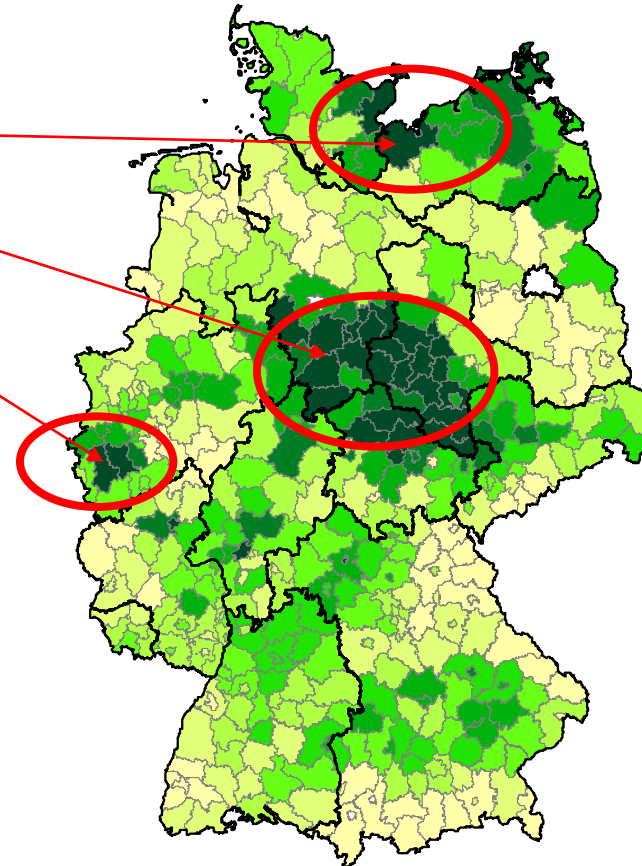
A typical farm...

- ⇒ 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

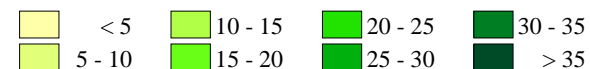
A standard operating procedure (SOP) to define typical farms was developed and is used by all partners involved.

How and where typical Farms are selected – Example Germany

Hot spots
in wheat
production

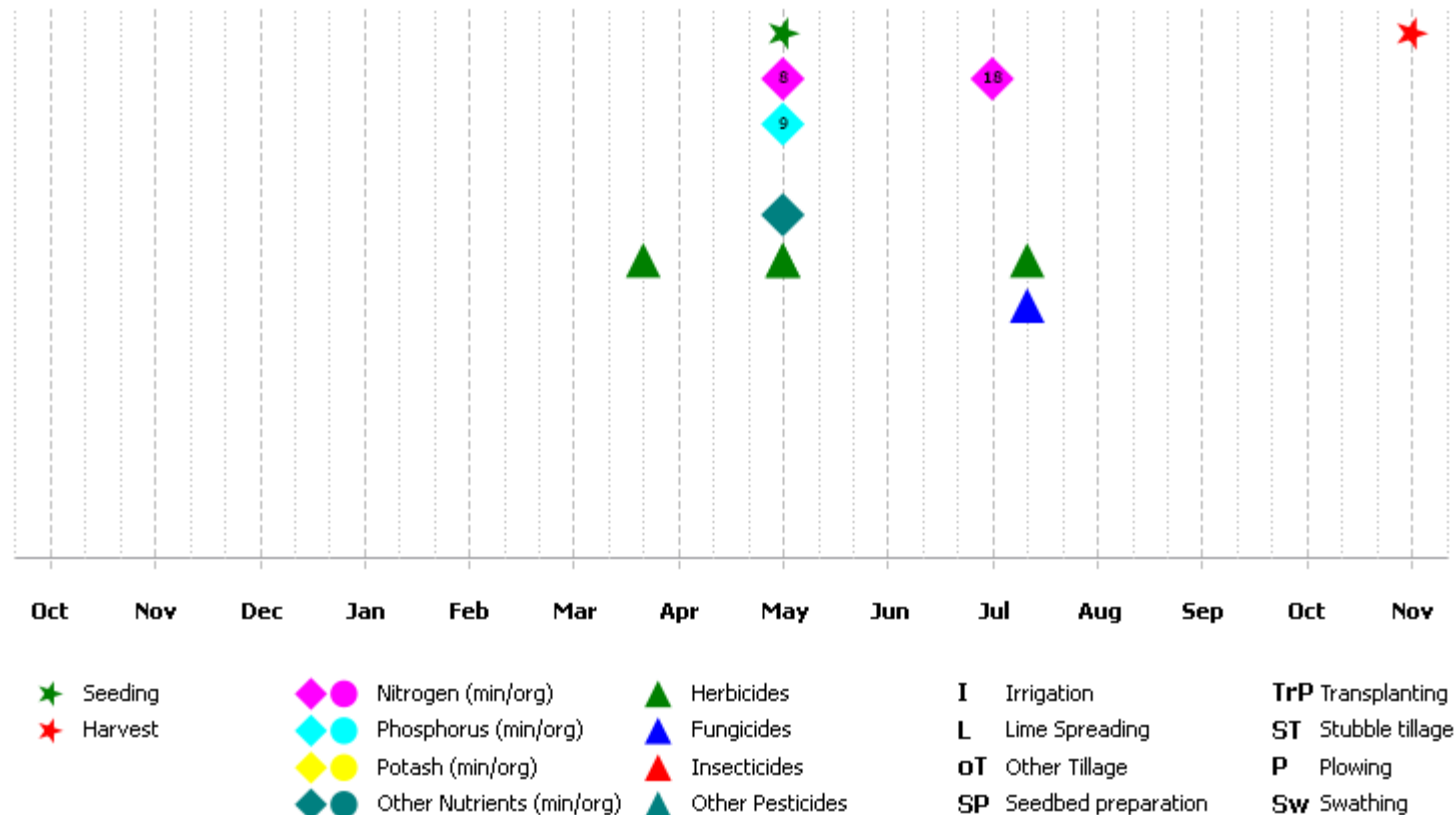


Share of wheat acreage in total arable land (in %)



Data on Cropping Systems – Example: Malting barley in Western Australia

AU4000WB* - barley (malt) after wheat



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



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



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 -

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