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Revisiting Farmer Value, Perception & Potential

Cam Camfield
Stratovation Group

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STRATOVATION GROUP

Areas of Focus

- Agriculture, Food & Sustainability
- Tech, Innovation & Connectivity
- Fintech & Risk Management
- Innovators & Startups

Our Beliefs

Through focused customer centricity, we engage in farmer-focused research, marketing consulting, strategic communications, media engagement, and creating partnerships to help you win.

We are:

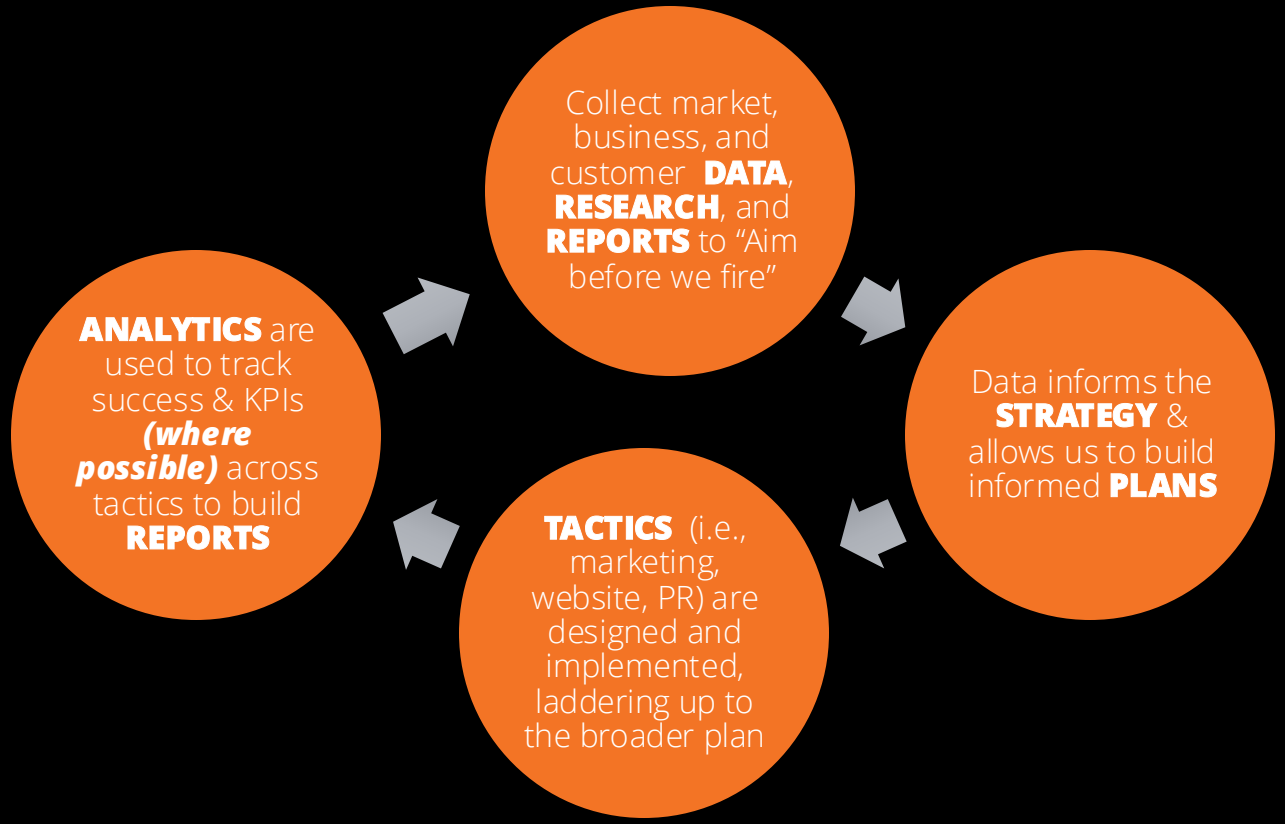
- Results-focused
- Creative and innovative
- Flexible and prompt
- Experienced and trusted
- Passionate and driven

STRATOVATION GROUP

Practice Areas

- Market Research & Business Intelligence
- Strategy & Consulting with Deliverables & Measurements
- Marketing & Branding
- Strategic Communications
- Web/Digital/Multimedia Development & Commercialization
- Event Planning

Data Driven Approach



REVISITING FARMER VALUE, PERCEPTIONS OF AG BIOLOGICALS

Farmers are the center of our world

and it's time for the market to listen to them more - the good, the bad and the ugly

- The field of **agricultural biologicals is a rapidly moving platform of innovation.** This study revisits the sector for the first time since Stratovation's groundbreaking baseline study in 2022.
- Until then, most **available research reports focused on macroeconomic trends, devoid of farmer perceptions** and context from the farm gate.
- While other reports helped in broad trend analysis, **they lacked the details needed to identify the opportunities, challenges, and other key factors growers consider** when building their crop nutrition and protection plans.
- To solve this market gap, **Stratovation Group developed the "Perceptions of Biologicals" program** in 2022, with this new version in 2024.
- **This is a farmer-centric study**, conducted with and in support of industry participants, **to help aid in the continued growth and development of the market category as a whole.**

ABOUT THE PARTNERS

Ag Retailers Association (ARA)

- *ARA advocates, influences, educates and provides services to support its members in their quest to maintain a profitable business environment, adapt to a changing world and preserve their freedom to operate.*

The Fertilizer Institute (TFI)

- *TFI is the leading voice of the fertilizer industry, acting as an advocate for fair regulation and legislation, a consistent source for trusted information and data, a networking agent, and an outlet to publicize industry initiatives in safety and environmental stewardship.*

D.C. Legislative & Regulatory Services (DCLRS)

- *DCLRS is a bipartisan lobbying and government relations firm representing a diverse group of clients before Congress and federal regulatory agencies.*

Stratovation Group

- *Stratovation Group helps innovative companies understand and attack problems through research, consulting, & marketing services.*

A Unique Partnership

Stratovation Group has partnered with the Ag Retailers Association, The Fertilizer Institute, and D.C. Legislative and Regulatory Services for this important effort.

COMMITTED SPONSOR PARTNERS

in order of commitment

STUDY OBJECTIVES

UNDERSTAND

- Awareness of, and how farmers define biologicals and their sub-categories (i.e., bio-stimulants, bio-pesticides)
- The purchase history, usage, & future intent of use for biologicals, by sub-category & application type, including their connection to carbon sequestration
- Top sellers & retailers of biologicals, including preferred mediums (i.e., retail, direct)
- Negative perceptions or challenges from current or past use

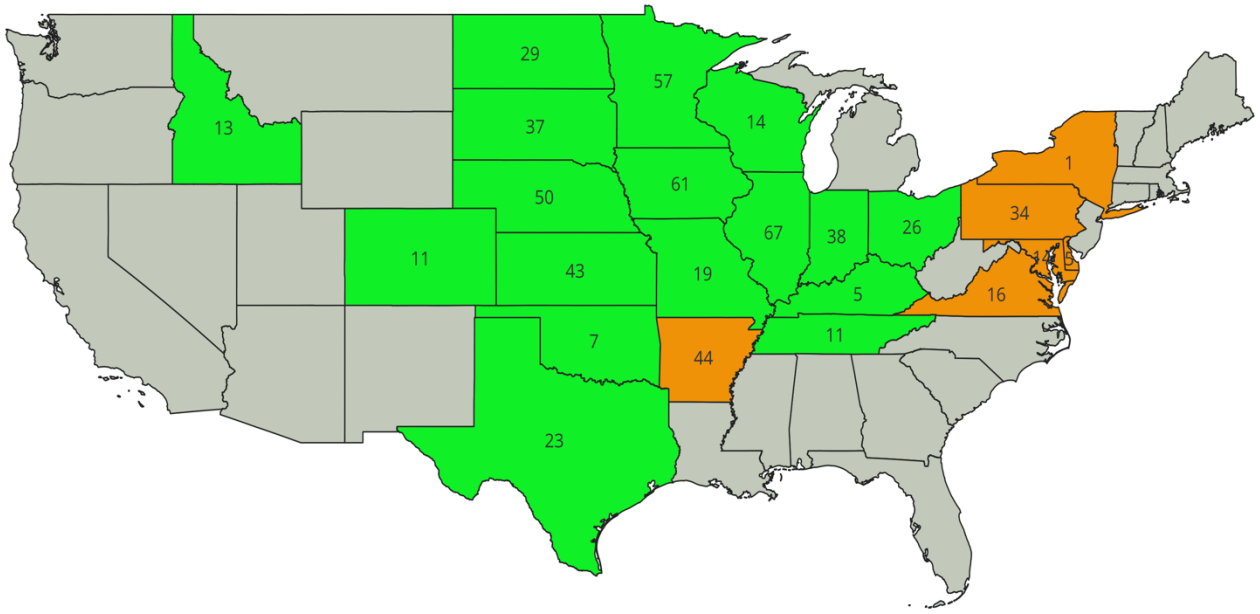
IDENTIFY

- The demographics, psychographics, and geographics of large row crop producers (i.e., corn, soybeans, wheat, sugar beats, potatoes, & sorghum) using biologicals
- Key value propositions for biologics in the minds of producers
- High-level price sensitives at the acre level of different biologicals

DISCOVER

- How farmers track and assess the success, effectiveness, and ROI of biologicals
- The awareness and perception leaders in the space, including but not limited to;
  - Product companies
  - Retailers & distributors
  - Thought leaders
  - Media & news outlets

RESEARCH APPROACH



TARGET AUDIENCE

600+ combined acre row crop farmers *(corn, soybeans, wheat, sugar beets, potatoes, & sorghum)*

APPROACH

Mixed approach survey *(Blind)*

TOTAL RESPONSES

Survey: 6 00+

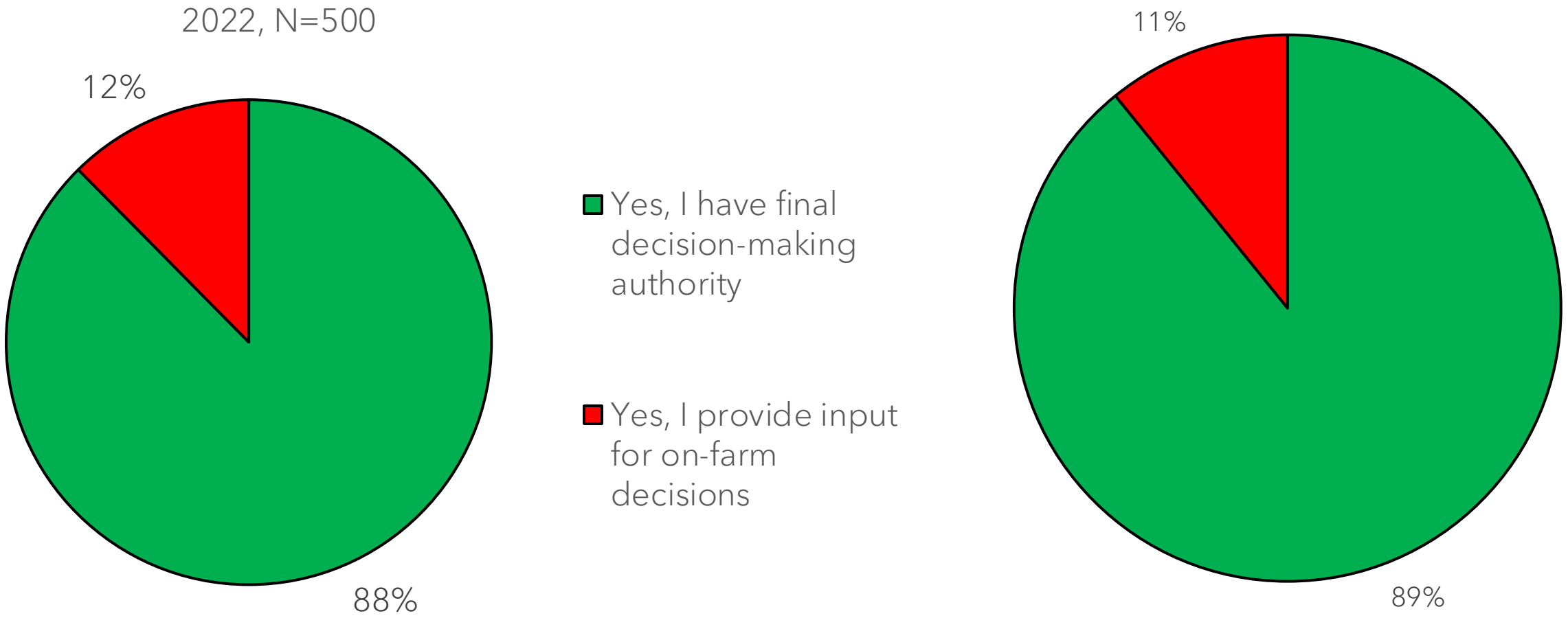
DATES IN THE FIELD

Spring 2024

QUICK FINDINGS

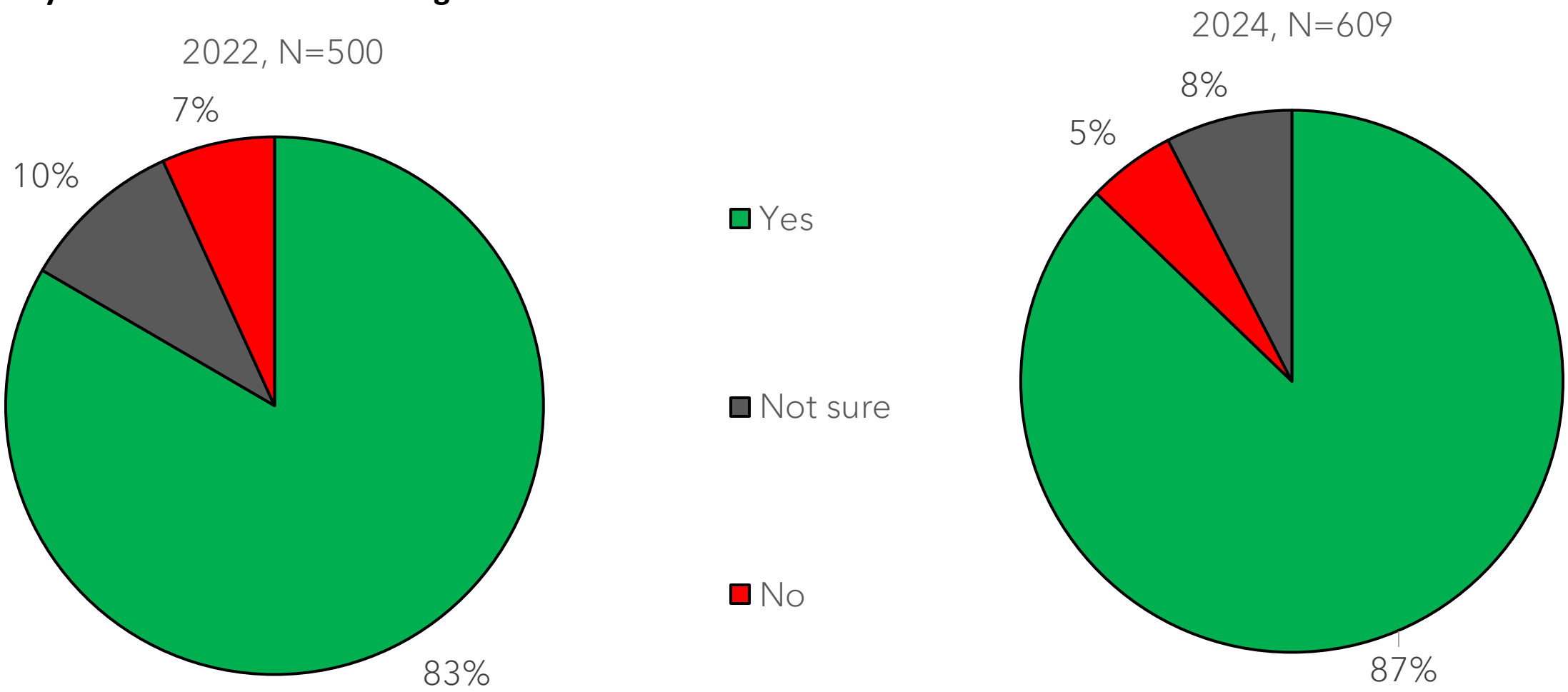
Majority of respondents *(89%)* were final decision makers

Are you a decision maker on your farm or operation?



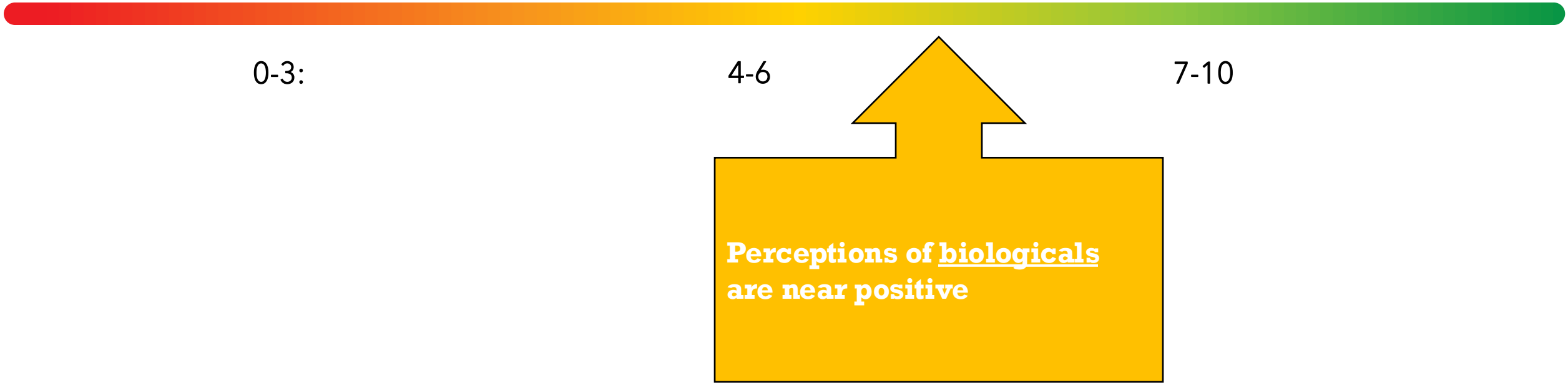
Majority *(87%)* of farmers have heard of the term biologicals, up 4 percentage points since 2022

Have you heard of the term biologicals?



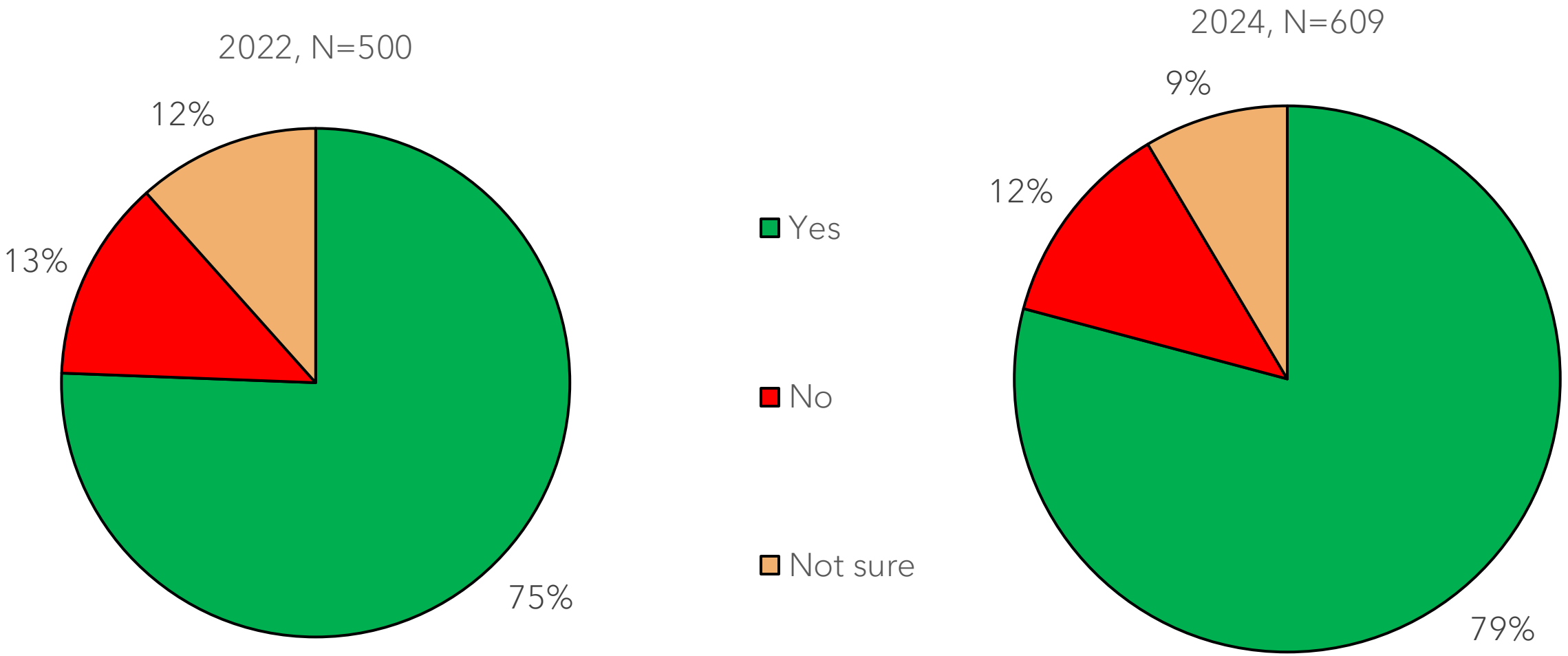
Those aware of the term biologicals rated their perception at 6.14/10 – which is neutral but near positive *(7/10)*

***(ONLY** if answered YES in Aware of the term Biologicals)* **On a scale of 0-10, with 0 being "very negative" and 10 being "very positive," what would you rate your perception of biologicals?**



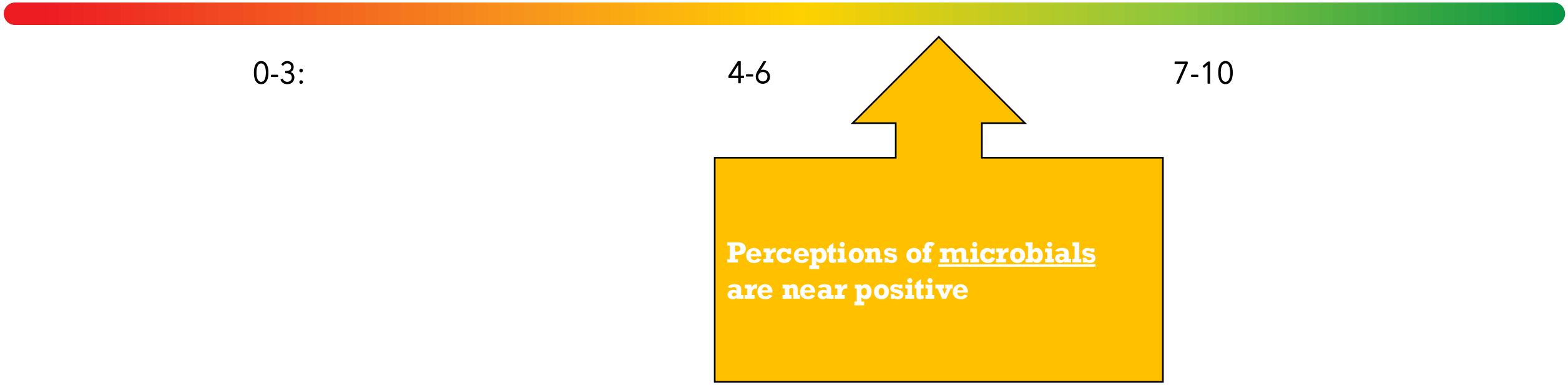
Majority *(79%)* of farmers are familiar with the term microbials, up 4 percentage points since 2022

Have you heard of the term microbials?



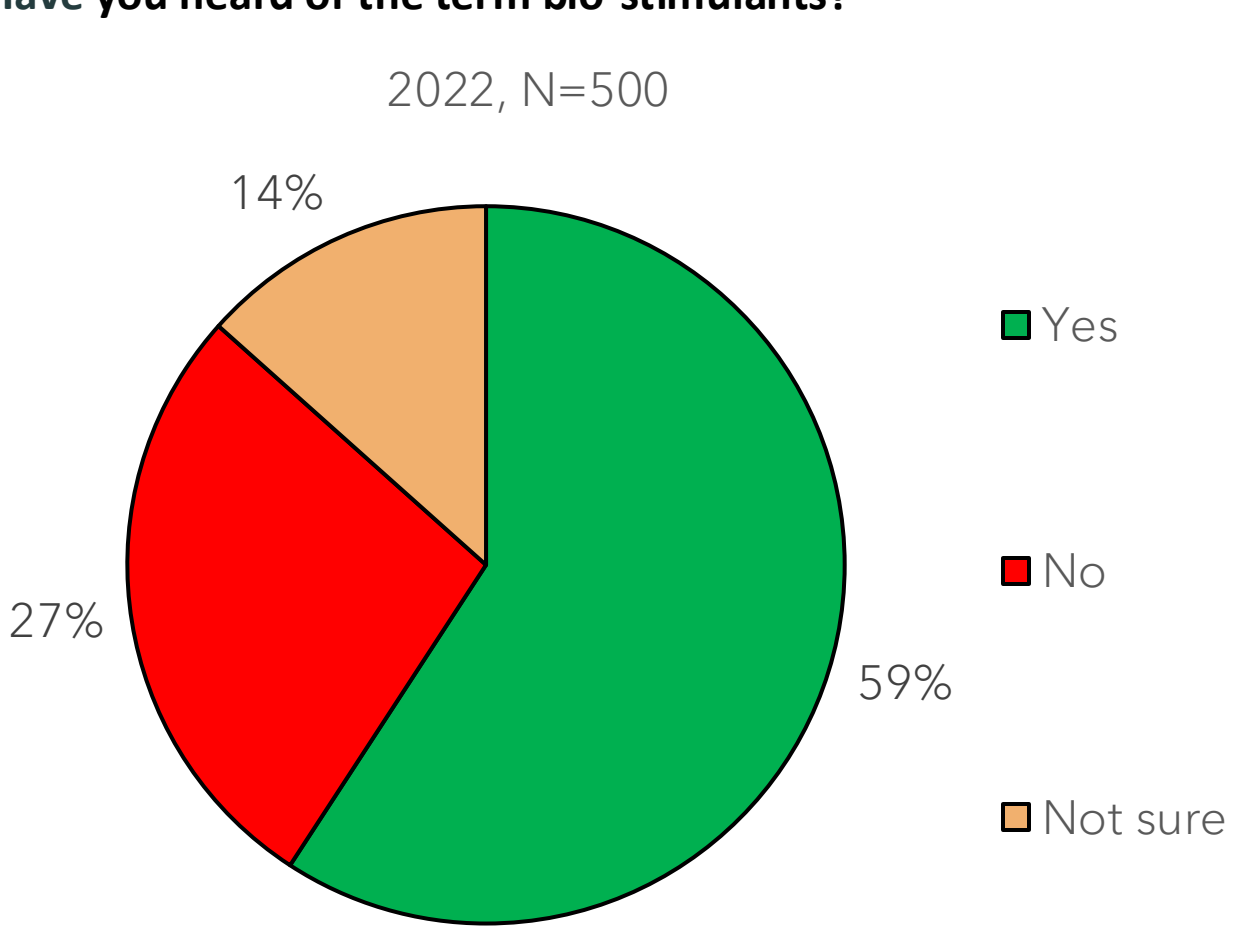
Farmers aware of the term microbials rated their perception at 6.27/10 – which is neutral but near positive *(7/10)*

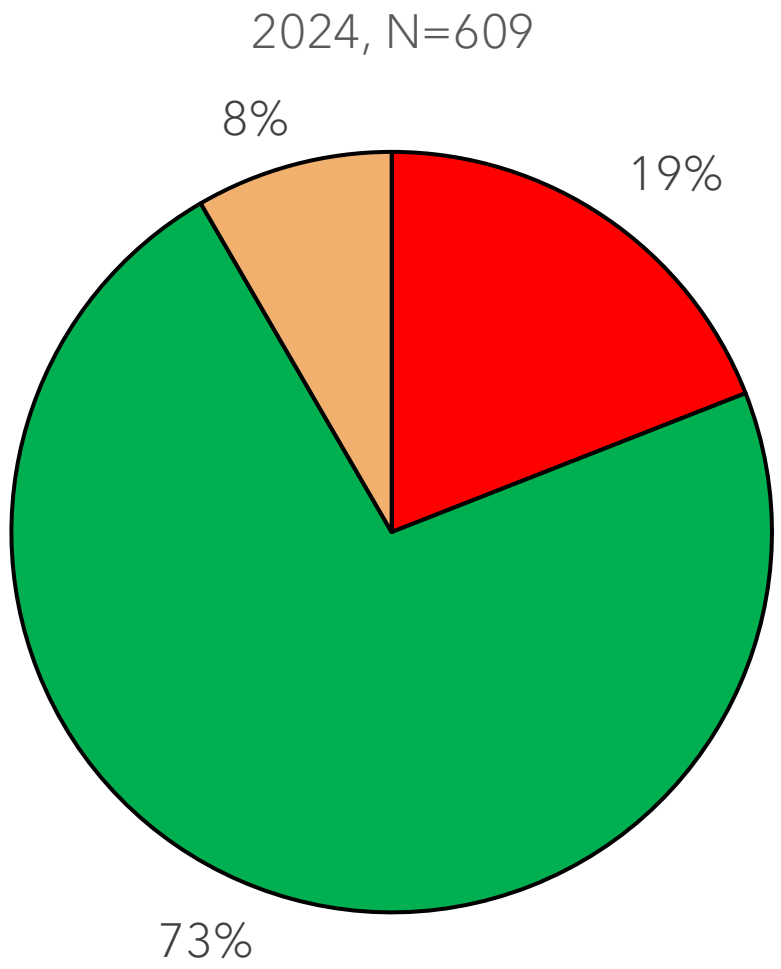
(ONLY if answered YES in Aware of the term Microbials) **On a scale of 0-10, with 0 being "very negative" and 10 being "very positive," what would you rate your perception of microbials?**



Majority *(73%)* of producers are familiar with bio-stimulants, up 14 percentage points since the 2022 study

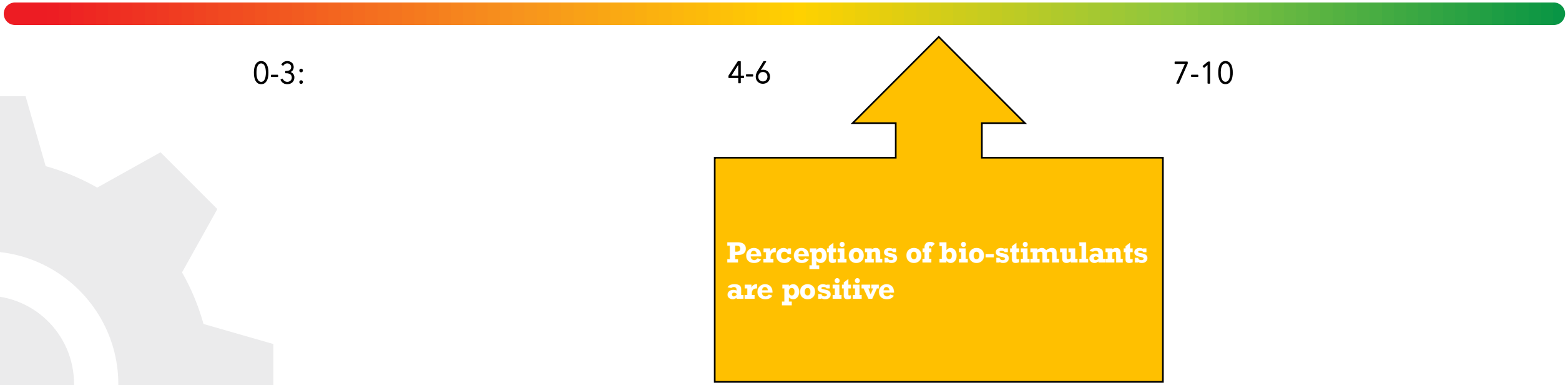
Have you heard of the term bio-stimulants?





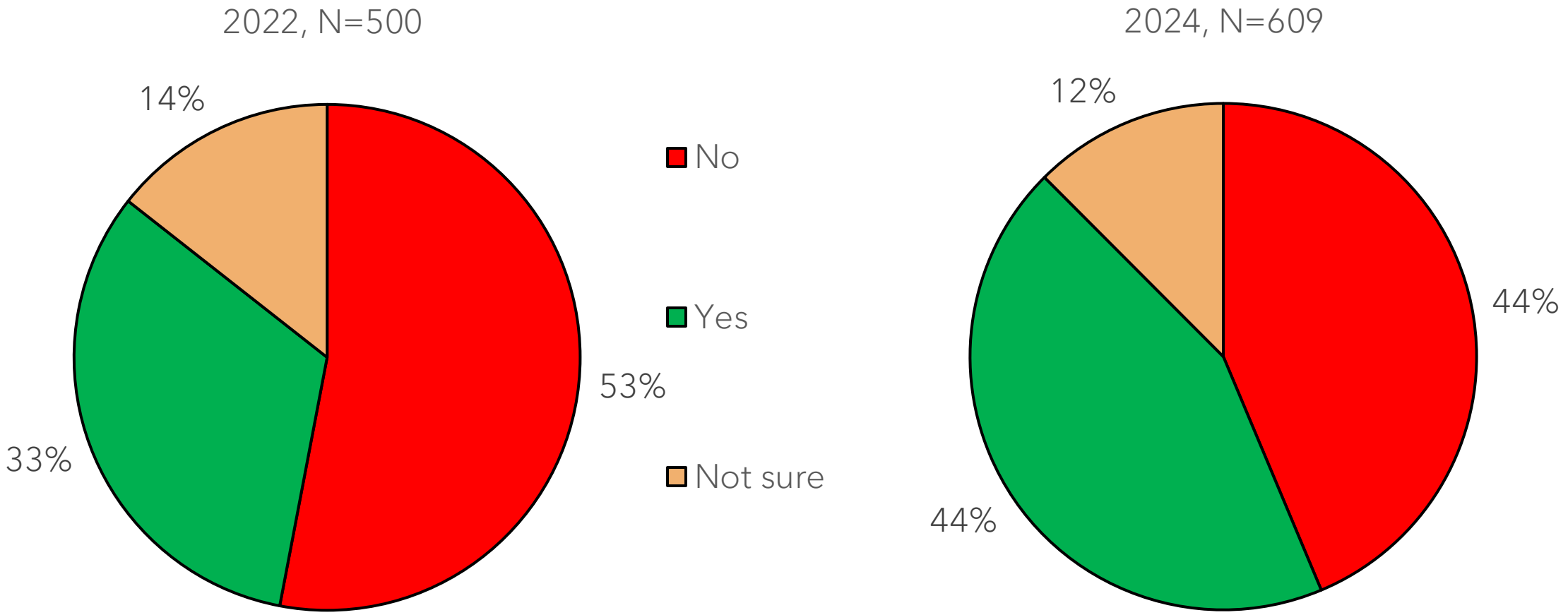
Farmers aware of the term bio-stimulants rated their perception at 6.18/10 – which is neutral but near positive *(7/10)*

***(ONLY** if answered YES in Aware of the term bio-stimulants)* **On a scale of 0-10, with 0 being "very negative" and 10 being "very positive," what would you rate your perception of bio-stimulants?**



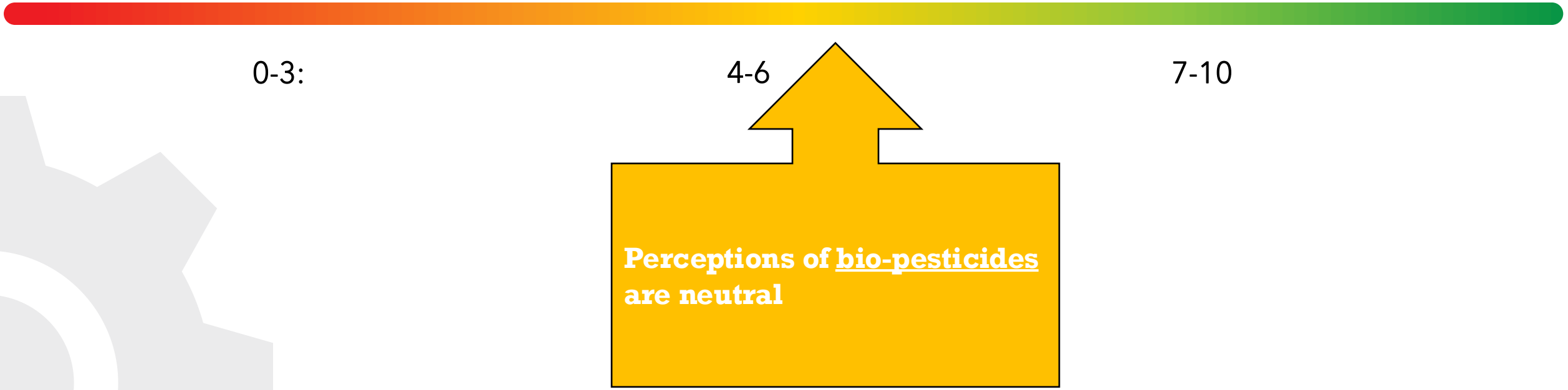
Almost half *(44%)* of producers are familiar with the term bio-pesticides, up 11 percentage points since 2022

Have you heard of the term bio-pesticides?



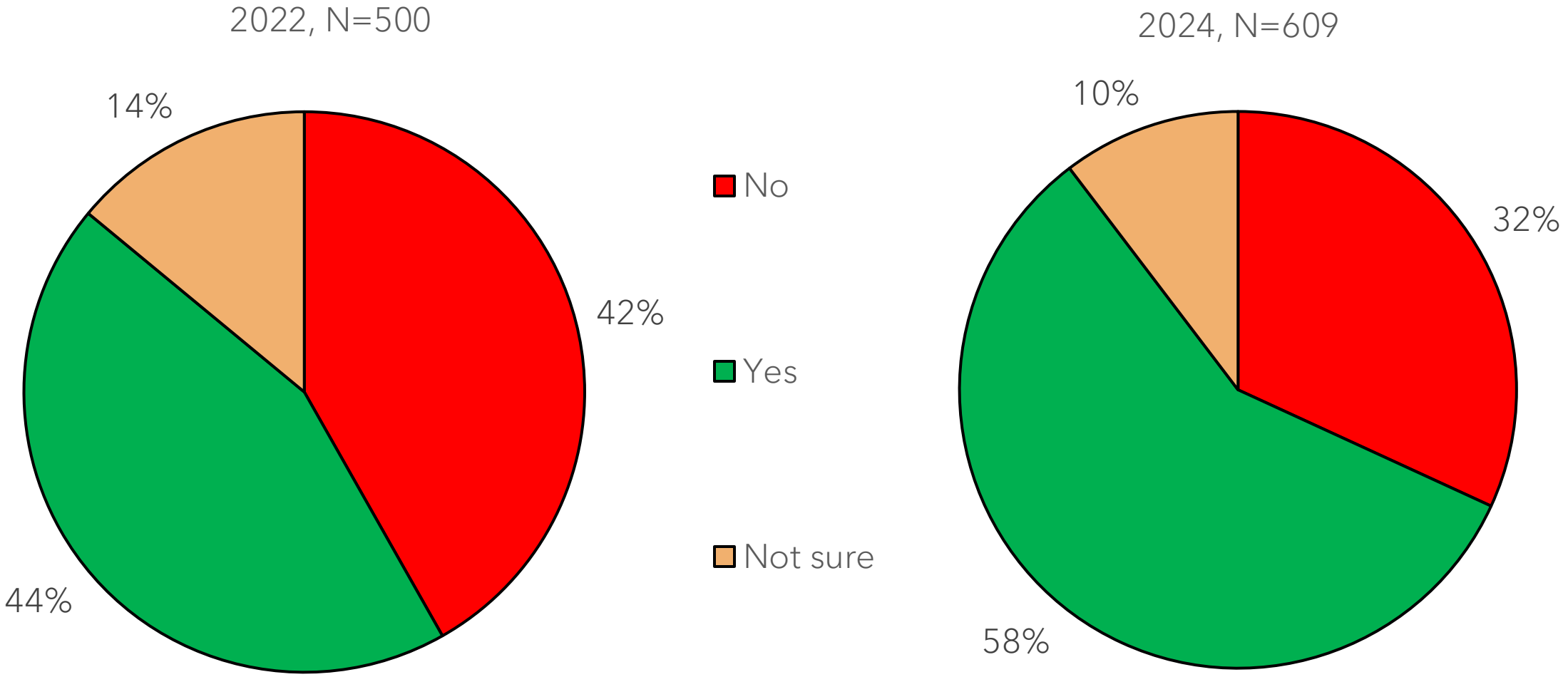
Farmers aware of the term bio-pesticides rated their perception at 5.82/10 – which is neutral

(ONLY if answered YES in Aware of the term bio-pesticides) **On a scale of 0-10, with 0 being "very negative" and 10 being "very positive," what would you rate your perception of bio-pesticides?**



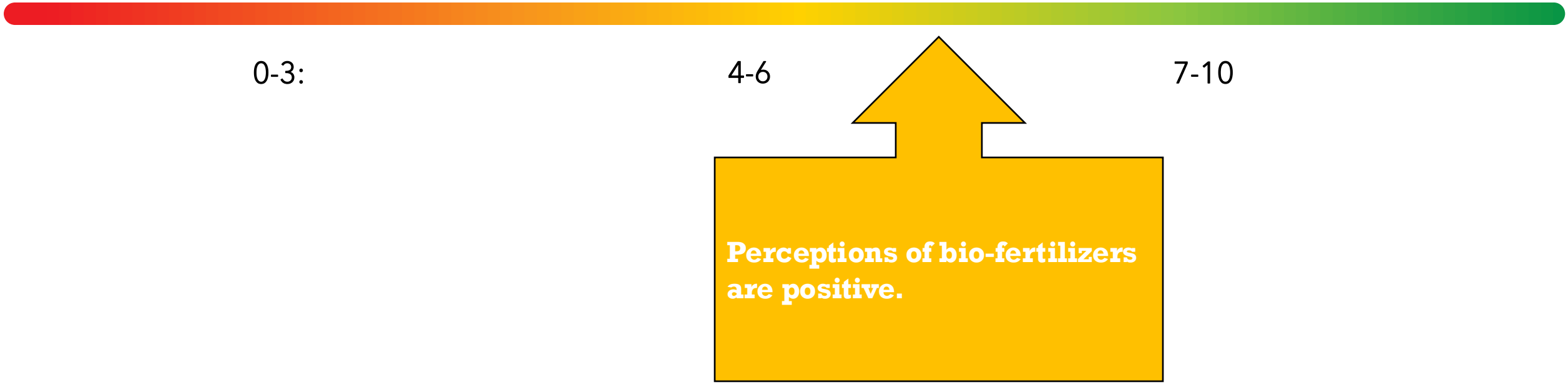
Just over half *(58%)* of farmers had heard of the term bio-fertilizers, up 14 percentage points since 2022

Have you heard of the term bio-fertilizers?



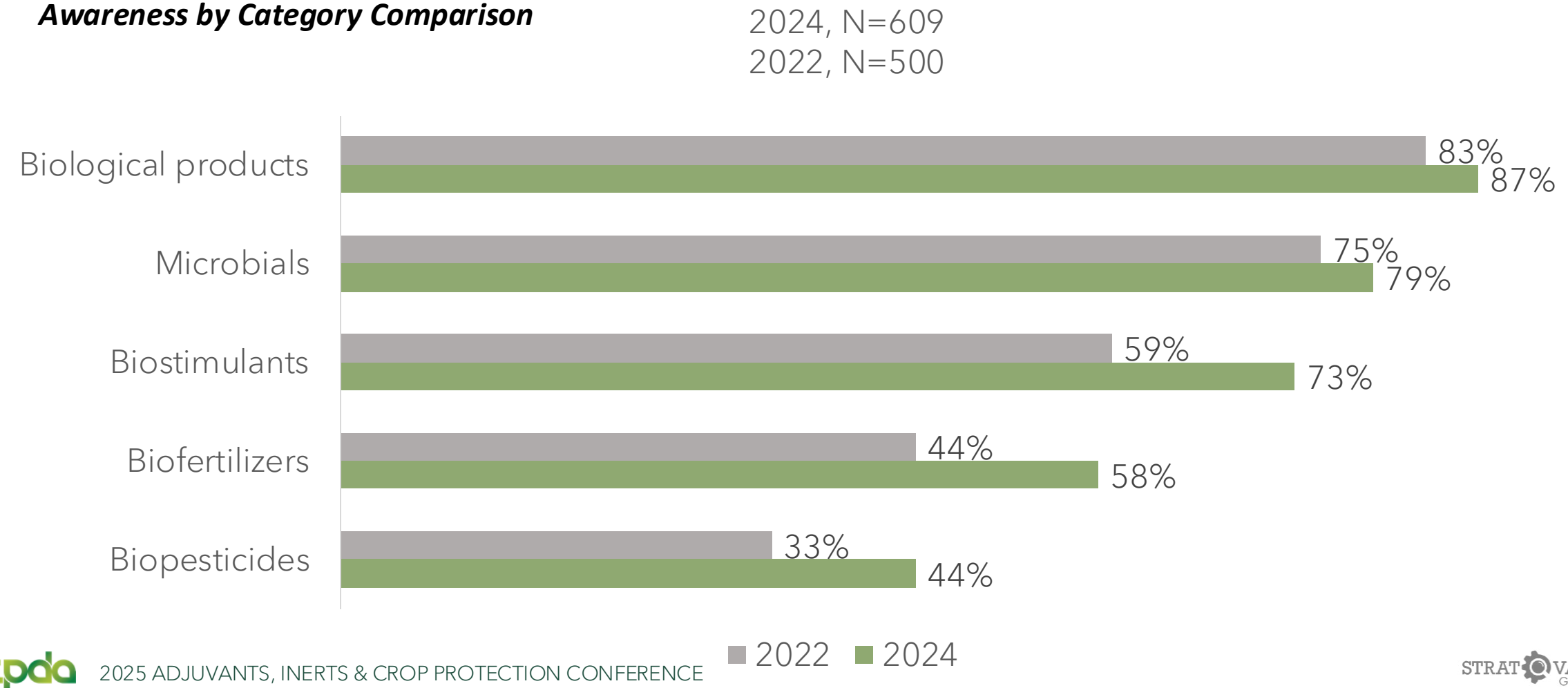
Farmers aware of the term bio-fertilizers rated their perception at 6.20/10 – which is neutral but near positive *(7/10)*

***(ONLY** if answered YES in Aware of the term bio-fertilizers)* **On a scale of 0-10, with 0 being "very negative" and 10 being "very positive," what would you rate your perception of bio-fertilizers?**



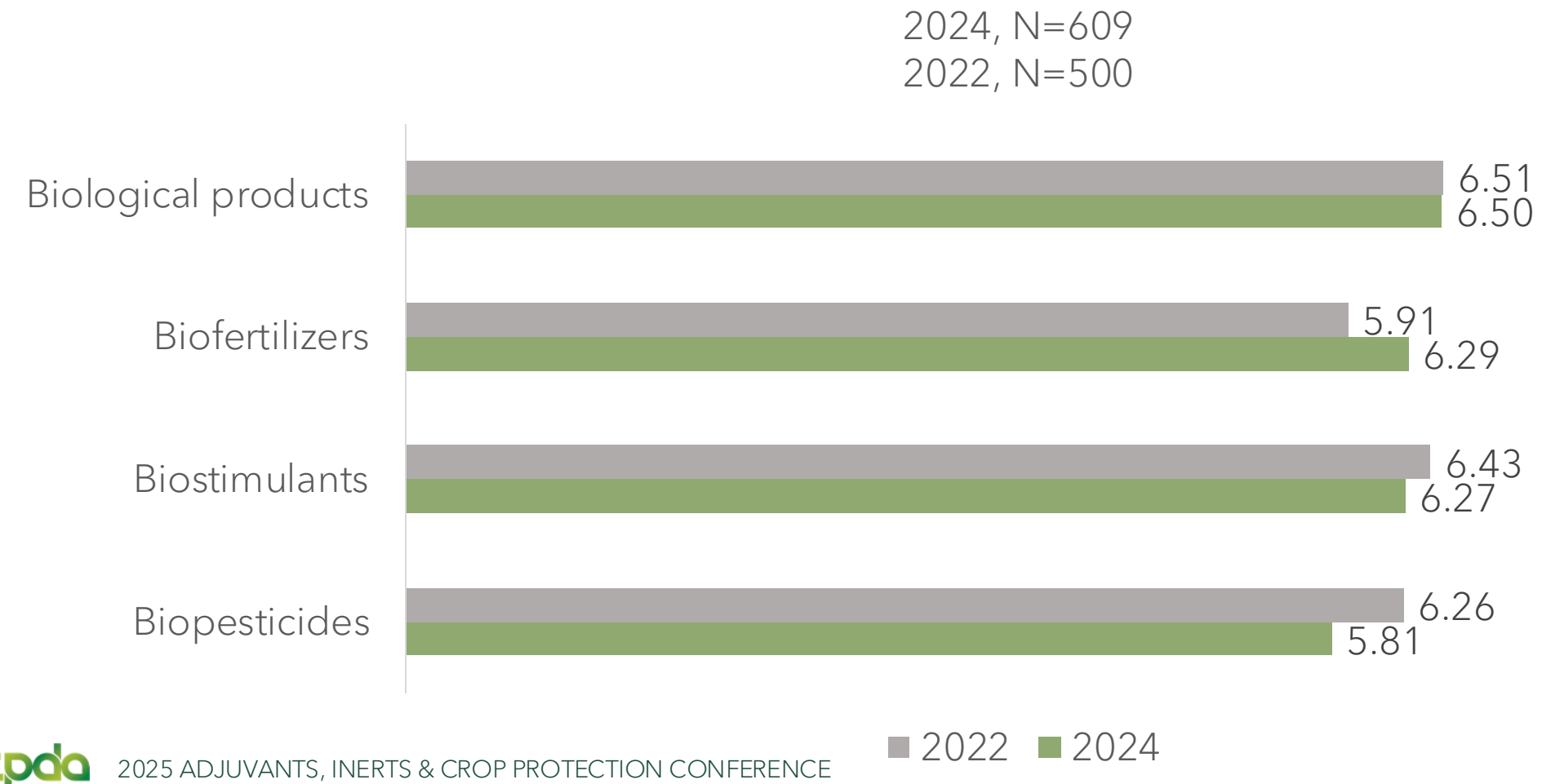
Biologicals *(87%)* and microbials *(79%)* are the most known key terms – with **all categories rising in awareness between 4-14 % points**

Awareness by Category Comparison



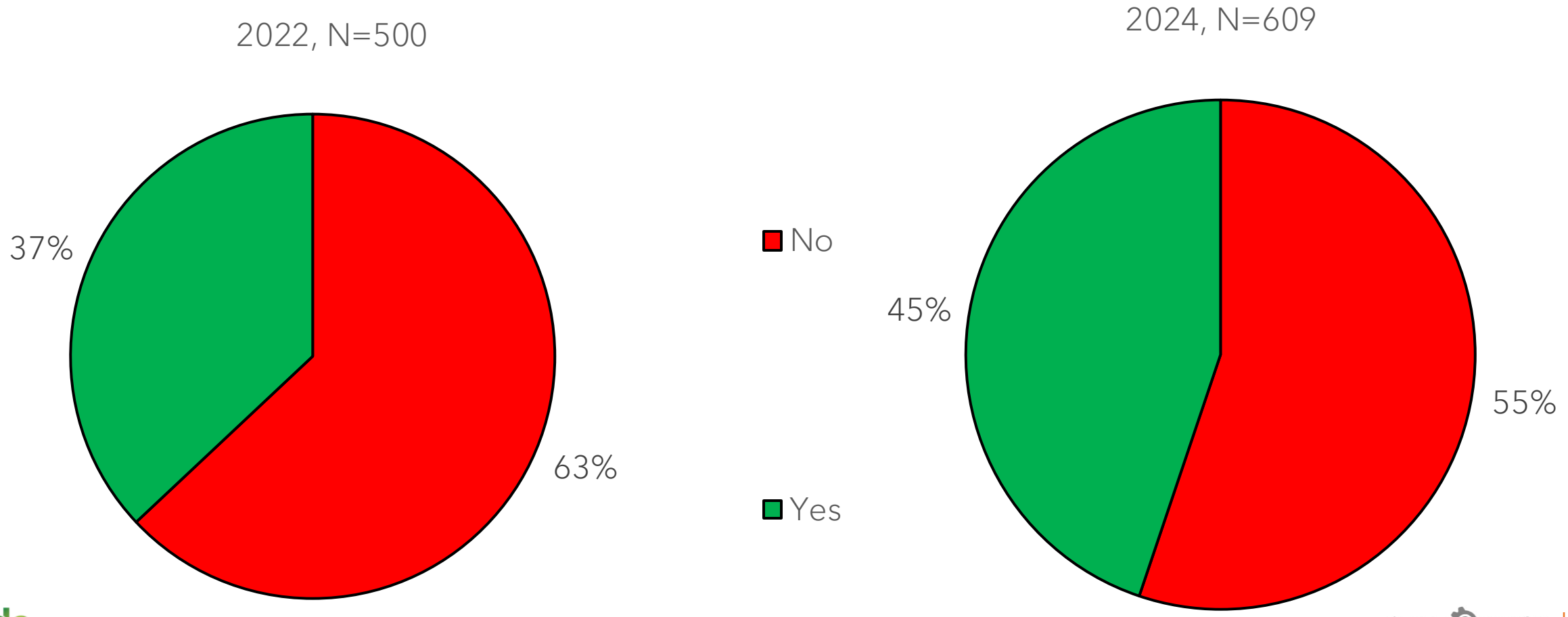
Farmers are on average somewhat interested in the biological product category *(~6/10)* – with interest near 2022 levels

On a scale of 0-10, with 0 being "not at all" and 10 being "very," how interested are you in each of the following topics?



Just under half *(45%)* currently purchase or use biological products, up 8 percentage points from ‘22

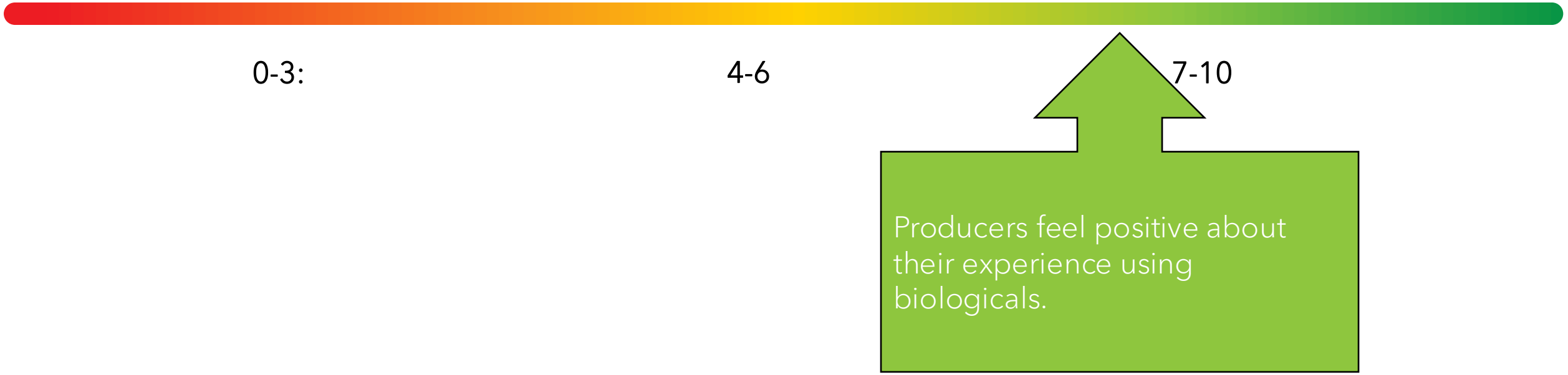
Based on these definitions, do you currently purchase or use any biological products, including bio-fertilizers, bio-stimulants, and bio-pesticides?



Biological user farmers rate their experience with biologicals a 7.01/10, showing a positive perception

CURRENTLY USE

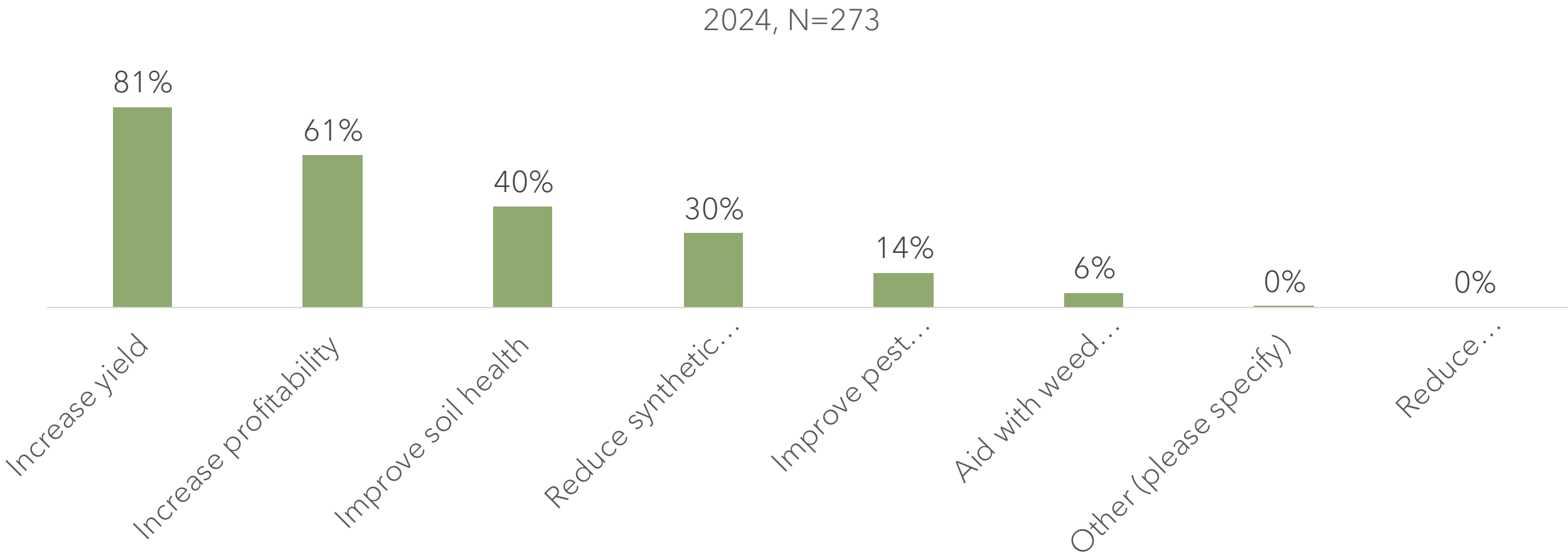
On a scale of 0-10, with 0 being "terrible" and 10 being "fantastic" how would you rate your experience with biological products? N=185



A majority *(81%)* hoped it would increase their yields or increase their profitability *(61%)*

CURRENTLY USE

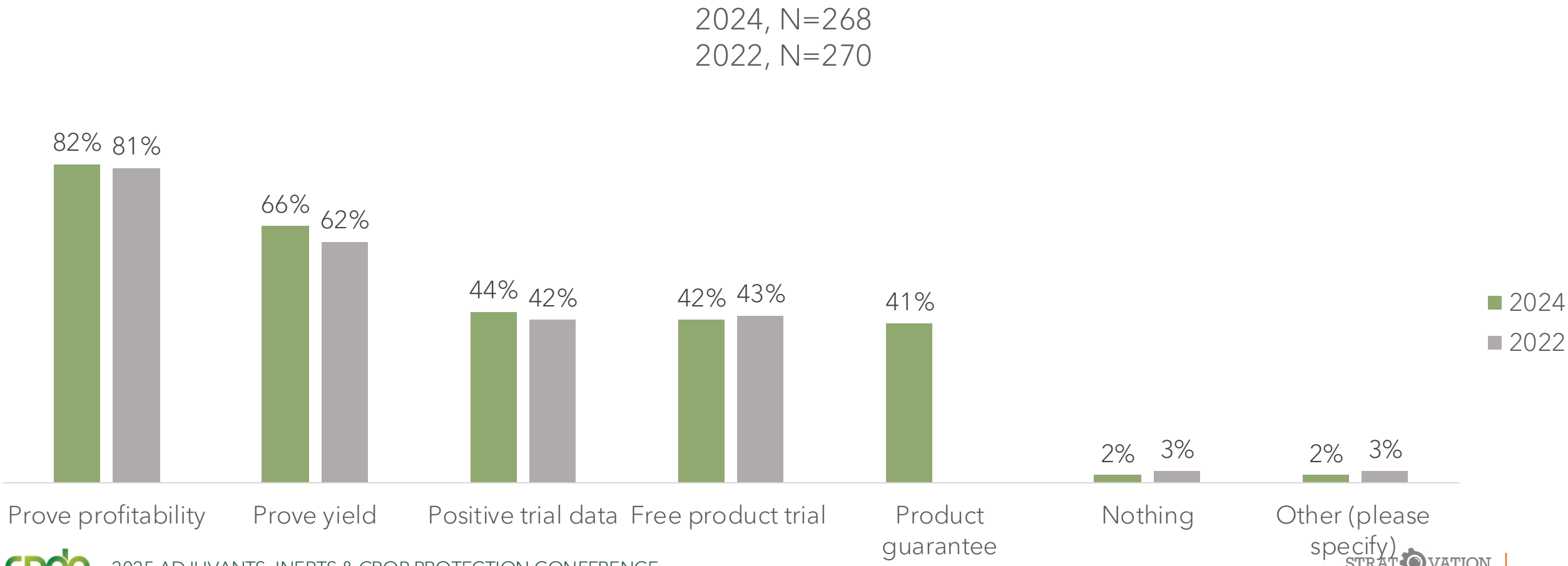
What were you hoping it would do for your operation?



Producers who are not using bios believe biologicals need to prove profitability *(82%)* and ability to increase yield *(66%)*

NEVER USED

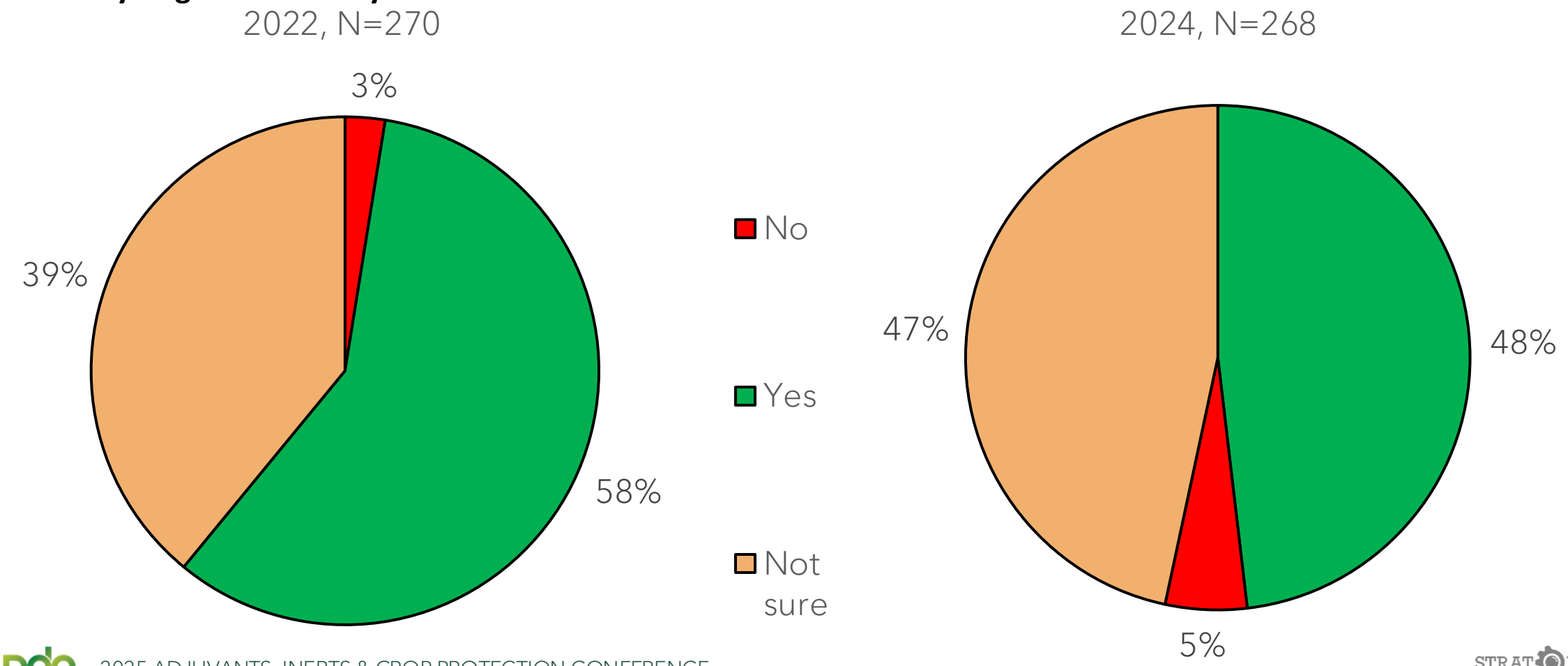
What would need to be true for you to try or use biological product types? (select all that apply)



Almost half of *(48%)* farmers who don't currently use bios would trust a friend / advisor if they were recommended

NOT CURRENTLY

If someone in your network of trusted friends or advisors recommended these products for your operation, would you give them a try then?



THANK YOU

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