

# CropLife 100

## The 41st *CropLife* 100

Taking the pulse of the one of the agricultural industry's most important segments — the ag retailer.

**E**VERY YEAR, VARIOUS PUBLICATIONS around the globe have devoted time to examining how their primary target audience has performed during the past 12 months. Here at *CropLife*® magazine, we are no different. Each and every year for the past 41 years, we've sent out surveys to our readership to find out numerous things — how they've done, financially, during the current year, what concerns/opportunities they see in the marketplace, and how they expect to perform during next year's season.

The result of these efforts is the annual *CropLife* 100 report, which you now hold in your hands. Throughout the decades, the data from this survey has been the benchmark among agricultural industry watchers and experts to gauge how one of the most important and influential segments of the business is doing — the ag retailer.

For the 2024 *CropLife* 100 report, we are proud to have WinField United as our official sponsor. This well-known, agricultural-focused company is no stranger to ag retail. The company has direct ownership in one of the *CropLife* 100's largest entities — GreenPoint Ag — and numerous partnerships with other ag retailers that are ranked within the annual *CropLife* 100 listings.

And WinField United knows the value ag retailers bring to the agricultural table. In fact, according to Leah Anderson, President of WinField United and Senior Vice President for

Land O' Lakes, ag retailers are one of the major focuses for the company and its industry mission.

"We have a purpose as WinField United: To enable the retailer to be the hero at the farmgate," says Anderson. "We are not the only player in the marketplace. What makes us unique is that we're taking the millions of data points our system produces every year and putting them to work through the local connections and leadership of our retail owners. We want to help the people in this industry achieve their greatest potential — whether they are our own employees, our retailers, or the farmers they serve."

In her mind, says Anderson, this pairing of technology knowhow and data-backed insights with "a personal touch" is the key for WinField United and its retail owners in achieving a key marketplace goal: Relevancy.

"If you look at what's going on in agriculture today, we have a challenging macro environment, challenging economics, and new risks appearing all the time that the country's farmers are facing," she says. "With all this in mind, we want to make sure that WinField United and our retail owners are staying relevant to provide the greatest value to America's farmers."

On the following pages, readers can find out for themselves how this "drive for relevancy" played out for the nation's top ag retailers during 2024.

— *The Editors*

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# The 2024 *CropLife* 100

## Weathering a Rough Year

Photo: Bjorn B / stock.adobe.com

The overall numbers for the nation's top ag retailers were less than stellar in 2024. However, there were some positive signs, particularly going into 2025.

**BY ERIC SFILIGOJ**  
EDITOR

**A**S A SNAPSHOT OF WHAT'S GOING ON IN THE AG RETAIL BUSINESS, the annual *CropLife 100* report can be incredibly insightful. Of course, not every growing season tells a positive story — at least at first glance.

And at first glance, the 2024 growing season was not one the nation's top ag retailers will remember fondly. According to the 2024 *CropLife 100* survey, the largest ag retailers recorded revenues totaling \$43.3 billion this year. While an impressive number by itself, this represented a \$3.4 billion decline from the 2023 totals, a 7.2% drop.

For the most part, virtually all of the members of the *CropLife 100* experienced a down revenue year in

2024 vs. 2023. This represented quite a change from just a few years ago. For instance, back in 2022, 99 out of the 100 nation's top ag retailers saw sales increases year-over-year for their crop inputs/services offerings. In 2024, the number of *CropLife 100* ag retailers recording sales gains for the year was only 15. The vast majority — 57 — saw across the board sales declines this growing season. The remainder had flat sales.

Perhaps not surprisingly, this “concern” over prices also came through loud and clear in the overall 2024 *CropLife 100* survey results. In most years, when ag retailers are asked what their major concerns/worries are and are expected to be during the upcoming growing season, finding/keeping good employees (a.k.a., labor) tends to dominate the percentages. In 2023,

for example, labor worries were cited by 34% of *CropLife 100* ag retailers as their top challenge going into the 2024 growing season. This far outpaced every other major concern by almost 10%.

As always, *CropLife*® magazine would like to thank all the *CropLife 100* retailers that decided to take part in the annual *CropLife 100* survey, for helping to make this report possible. We appreciate their time spent filling out our annual survey form. On the following pages, you will find the 2024 *CropLife 100* company rankings, charts on some of the survey's key findings, and a detailed analysis of a few major crop input/service areas.

However, according to the 2024 *CropLife 100* survey, labor concerns now rank second among key challenges, cited by only 26% of respondents. Instead, 54% of the nation's top ag retailers now say price volatility — from lower commodity prices to higher interest rates to higher crop inputs costs — is their chief concern for the 2025 growing season.

“The combined factors of rising costs, supply chain volatility, and growing demand for technology innovations are shaping a tough environment for ag retailers,” wrote Jamie Scanlon, Head of Customer Experience at Simplot Grower Solutions, on the company's *CropLife 100* form.

Ernie Roncoroni, President/CEO at Grow West, agreed with this assessment. “Stress at the grower level is unprecedented,” wrote Roncoroni on his company's survey form. “Low commodity prices, lack of demand, high cost of doing business, liquidity issues, and regulations are all impacting growers.”

### All Categories Suffer

To appreciate just how deep this revenue decrease ran for the nation's top ag retailers, consider the performances of the four major crop inputs/services categories – fertilizer, crop protection products, seed, and custom application — for 2024. In a typical year, one or two of the four categories will see some sales gains; the rest will not. This was certainly true in 2023, when three of the four categories saw revenue increases from the year before.

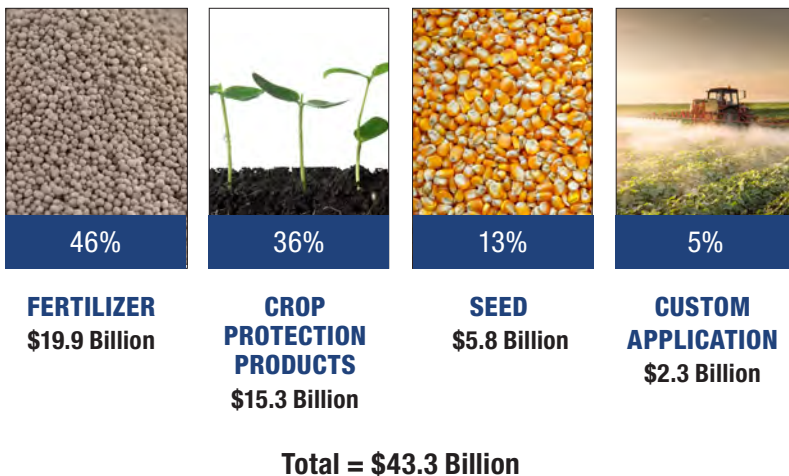
However, 2024 will go down as an exception to this rule. According to data collected in the 2024 *CropLife 100* survey, three of the four categories experienced sales declines for the year. The only one not to was the seed category. Here, overall revenues in 2024 were essentially flat year-over-year at \$5.8 billion. Despite this, seed was still able to increase its market share among all crop inputs/services, however, up 1% to 13%.

For the other three categories, the tally for the year was in levels of loss vs. 2023. For instance, the crop

## All Categories Were Down

Among the four crop inputs/services categories, all saw lower revenues than in 2023, with fertilizer performing the worst during 2024, losing \$2.5 billion in value.

### Categories by Sales/Market Share (In Billions)

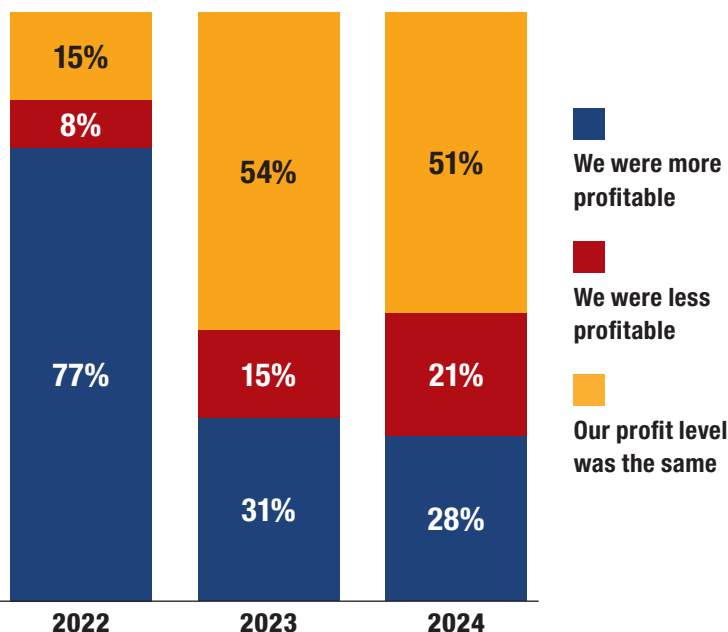


Base = 86 | Source: 2024 *CropLife 100* Survey

## Profit Levels Flat

During 2024, most ag retailers saw the same profit levels as in 2023.

### Level of Profitability among *CropLife 100* Retailers



Base = 95 | Source: 2024 *CropLife 100* Survey

protection products category saw its overall revenue among *CropLife 100* ag retailers decline \$400 million, from \$15.7 billion in 2023 to \$15.3 billion this year. Like seed, however, the category did manage to regain some market share compared with the other crop inputs/services tracked within the *CropLife 100*. Overall, the crop protection products category now accounts for 36% share of all crop inputs/services, an increase of 2% from 2023.

For the remaining two categories — custom application and fertilizer — 2024 represented declines across the sales range, from actual revenues to market share. For the smallest category, custom application, 2024 was an off year. Overall, according to the survey data, revenues in this category dropped \$500 million, from \$2.8 billion in 2023 to \$2.3 billion this year. Market share for this category also was down, off 1% from 6% in 2023 to 5%.

However, for custom application, virtually all of this revenue decline stemmed from the fact that the



category includes ag technology products within its overall numbers. These were off significantly from 2023 due to a variety of factors. (For more details on the performance of ag technology, see p. 32.)

But the biggest loser in terms of revenues/market share was the largest category, fertilizer. Not too many years ago, the fertilizer category represented more than half

of all crop inputs/services (51%, to be exact) sold for *CropLife 100* ag retailers on an annual basis. For the past few years, however, sales for this category have steadily dropped.

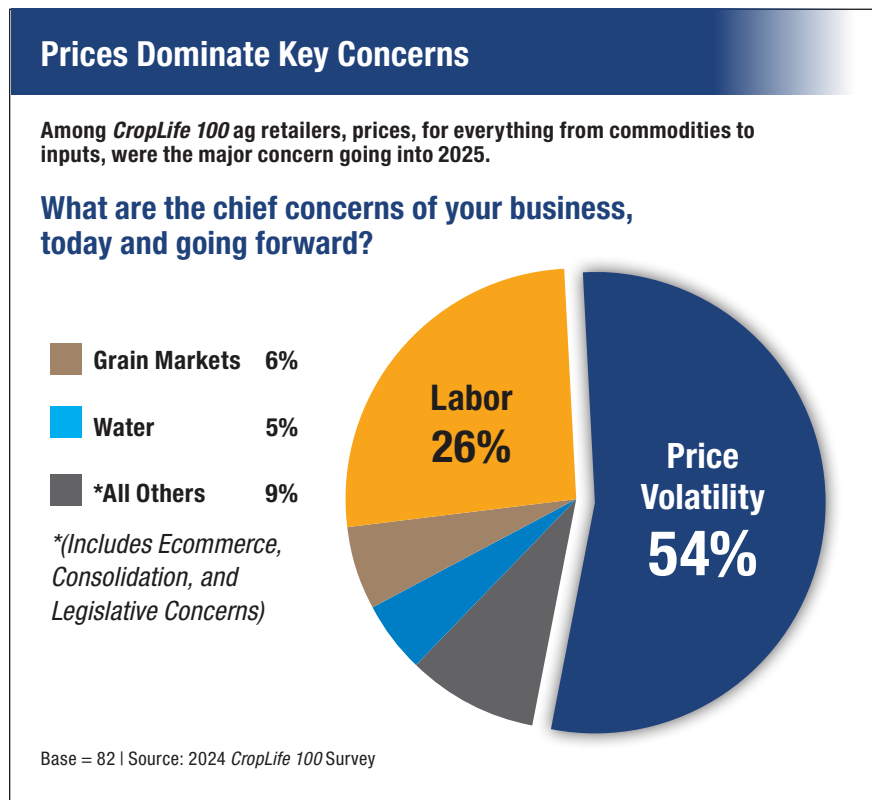
In 2024, this decline accelerated quite a bit. According to the 2024 *CropLife 100* survey, the fertilizer category had sales of \$19.9 billion this year, down \$2.5 billion from the 2023 total of \$22.4 billion. As a result of this loss, market share for the category fell even further back, down from 48% in 2023 to 46% this year. This is essentially the same market share the fertilizer category held back at the start of the 2020s.

#### The Smaller, the Better

Even with all these poor numbers, the 2024 *CropLife 100* survey of the nation's top ag retailers did provide some positive news. Indeed, for this year's growing season, it seems that the smaller the segment, the better it performed.

Each year, *CropLife* tracks the sales performances of 10 different sub-segments of the ag retail business. On the survey, we asked respondents to tell us if their sales for each of these sub-segments have grown, declined, or stay flat year-over-year. And in 2024, three of the smaller segments lead the industry in overall growth.

Coming in best for the 2024 growing season was biologicals. According to the nation's top ag





retailers, 63% saw their revenues in this segment improve by between 1% and more than 5% for the year. Another 27% had flat biologicals sales, with 10% recording sales declines.

Two other sub-segments that performed well in 2024 were adjuvants and micronutrients. For these sub-segments, 58% and 53% of *CropLife 100* members, respectively, recorded revenue gains of between 1% and more than 5%. The other two sub-segments to see more than half of respondents increase their revenues were custom application and seed treatments (both at 52%).

Given all the negative numbers floating around from the 2024 *CropLife 100* survey, the nation's top ag retailers say that their grower-customers are still expecting the 2025 growing season to be a bit better in terms of overall performance. In the survey, *CropLife* asks respondents to tell us how their grower-customers would rate the prospects for the upcoming year on a scale of one to 10 — one being extremely bad to 10 being extremely good, with varying degrees of bad and good mixed in-between.

Biologicals, Adjuvants, and Micronutrients as Top Sales Gainers			
Among the sub-segments in 2024, biologicals, adjuvants, and micronutrients had the largest revenues gains.			
Segment	Sales Up 1% to 5%	Sales Flat	Sales Down 1% to 5%
Biologicals	63%	27%	10%
Adjuvants	58%	22%	20%
Micronutrients	53%	13%	34%
Custom Application	52%	34%	14%
Seed Treatment	52%	41%	7%
Precision Agriculture	46%	42%	12%
Crop Protection Products	43%	10%	47%
Fertilizer	42%	7%	51%
Biotech Seed	37%	47%	16%
Traditional Seed	14%	73%	13%

Base = 96 | Source: 2024 *CropLife 100* survey

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According to the 2024 *CropLife 100* survey, 11% of the nation's top ag retailers say their grower-customers are preparing for a rough economic season next year, rating the year between a one and a four. However, the other 89% foresee more positive results for 2025.

Based upon the survey data, the vast majority of *CropLife 100* ag retail grower-customers believe the 2025 growing season will rate between a five and a seven on the 10-point scale — pretty positive given how things played out during 2024. Better still, 31% of respondents say their grower-customers believe the 2025 growing season will rate between an eight and 10 in terms of profitability.

This would seem to bode well for the agricultural marketplace come next year. As always, time will tell. ▶



# About the Research

**C**OMPANIES INCLUDED in the 2024 *CropLife 100* listings were limited to independent dealerships and cooperatives that offer fertilizer, crop protection products, seed, and custom ap-

plication services. The figures do not include a host of services, such as data management, consulting/scouting, or grain elevator revenue. Dealerships and cooperatives are ranked in order by total sales

in their respective sales groups.

Errors or omissions? Think your company should be included on the list? Please email us at [erics@croplife.com](mailto:erics@croplife.com) to let us know.

Look for our TOP 10 lists on page 26.

## Greater than \$1 Billion IN RETAIL SALES

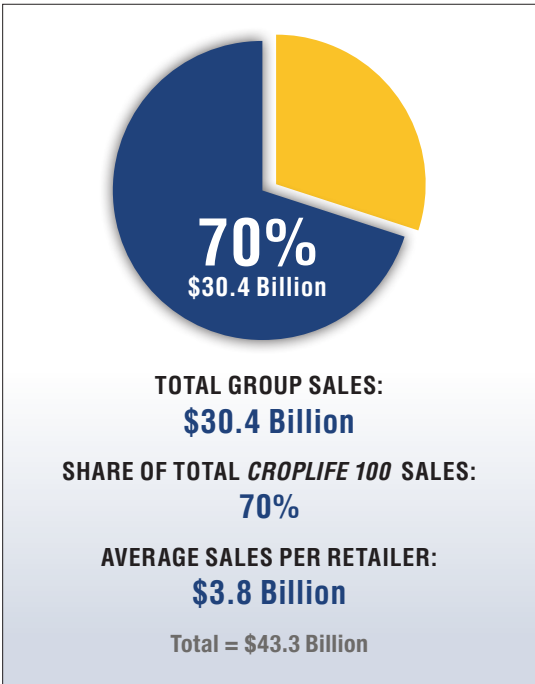
Rank/Company	Headquarters Location	# States Served	# Retail Outlets	Years in <i>CropLife 100</i>	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales
1 Nutrien Ag Solutions	Loveland, CO	45	1,500	41	41%	41%	14%	4%
2 Helena Agri-Enterprises	Collierville, TN	48	473	40	40%	41%	16%	3%
3 GROWMARK	Bloomington, IL	21	600	38	27%	45%	16%	12%
4 Simplot Growers Solutions	Boise, ID	32	244	40	40%	45%	13%	2%
5 CHS	Inver Grove Heights, MN	15	267	38	23%	58%	14%	5%
6 GreenPoint AG	Decatur, AL	10	78	7	27%	49%	22%	2%
7 Wilbur-Ellis	Denver, CO	19	151	39	48%	36%	12%	4%
8 Keystone Cooperative	Indianapolis, IN	3	163	25	25%	61%	9%	5%

COOPERATIVES: BLUE DEALERSHIPS: WHITE

### GREATER THAN \$1 BILLION

Percentage of total *CropLife 100* Revenues

**FACT:** There was significant movement in this group during 2024. Two large Indiana-based cooperatives — Co-Alliance and Ceres Solutions — formally combined their businesses. This not only added a new member to the “Big Seven” ag retailers (now “Big Eight”) but boosted the overall market share of these top companies among all *CropLife 100* ag retailers by 3%, to 70%.



## \$201 Million to \$1 Billion IN RETAIL SALES

Rank/Company	Headquarters Location	# States Served	# Retail Outlets	Years in <i>CropLife 100</i>	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales	
9	Agtegra Cooperative	Aberdeen, SD	2	65	34	23%	51%	18%	8%
10	MFA	Columbia, MO	4	151	32	20%	60%	14%	6%
11	NEW Cooperative	Fort Dodge, IA	2	88	15	25%	58%	13%	4%
12	Central Valley Ag Cooperative	York, NE	3	60	21	23%	63%	10%	4%
13	Valley Agronomics	Nampa, ID	6	37	13	33%	60%	4%	3%
14	Hefty Seed	Baltic, SD	10	49	23	66%	4%	30%	—
15	Aurora Cooperative	Aurora, NE	6	80	33	42%	44%	8%	6%
16	Effingham Equity	Effingham, IL	2	25	35	28%	51%	12%	9%
17	Sunrise Cooperative	Fremont, OH	1	26	8	26%	54%	12%	8%
18	Ag Partners Coop	Goodhue, MN	2	28	3	21%	56%	13%	10%
19	The McGregor Co.	Colfax, WA	3	38	41	46%	47%	5%	2%
20	United Cooperative	Beaver Dam, WI	1	17	16	23%	58%	17%	2%
21	Southern States Cooperative	Richmond, VA	7	82	34	21%	58%	16%	5%
22	Grow West	Woodland, CA	1	12	20	43%	56%	1%	—
23	Landus Cooperative	Des Moines, IA	2	50	8	30%	61%	4%	5%
24	Buttonwillow Warehouse	Bakersfield, CA	1	10	22	47%	49%	2%	2%

COOPERATIVES: BLUE DEALERSHIPS: WHITE

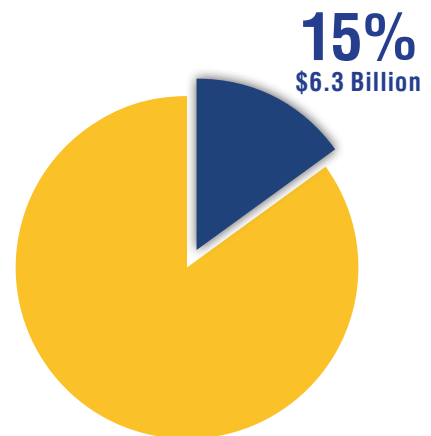
### \$201 MILLION TO \$1 BILLION

Percentage of total *CropLife 100* Revenues

**FACT:** This block of *CropLife 100* ag retailers saw a big decline in overall revenue due to the merger of Co-Alliance and Ceres moving two companies out of the mix. However, since a few of the ag retailers just missed this sales range in 2024, a strong sales year could move one to three companies up come the 2025 *CropLife 100* rankings.



17



TOTAL GROUP SALES:  
**\$6.3 Billion**

SHARE OF TOTAL *CROPLIFE 100* SALES:  
**15%**

AVERAGE SALES PER RETAILER:  
**\$392 Million**

Total = \$43.3 Billion

## \$151 Million to \$200 Million IN RETAIL SALES

Rank/Company	Headquarters Location	# States Served	# Retail Outlets	Years in CropLife 100	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales
25 BRANDT	Springfield, IL	2	18	41	32%	41%	19%	8%
26 United Prairie	Tolono, IL	1	14	13	31%	51%	11%	7%
27 Mid Kansas Cooperative	Moundridge, KS	4	60	16	23%	54%	15%	8%
28 Twin State	Davenport, IA	2	14	38	27%	61%	5%	7%
29 Frontier Cooperative	Lincoln, NE	1	60	21	22%	58%	14%	6%
30 Premier Companies	Seymour, IN	4	12	6	26%	55%	14%	5%
31 Mid Valley Agricultural Services	Oakdale, CA	1	7	36	47%	52%	1%	—
32 Central Farm Service	Truman, MN	2	32	23	24%	60%	9%	7%
33 River Valley Cooperative	Elkridge, IA	2	33	11	24%	61%	10%	5%
34 G.S. Long	Union Gap, WA	2	4	33	72%	27%	1%	—

COOPERATIVES: BLUE DEALERSHIPS: WHITE

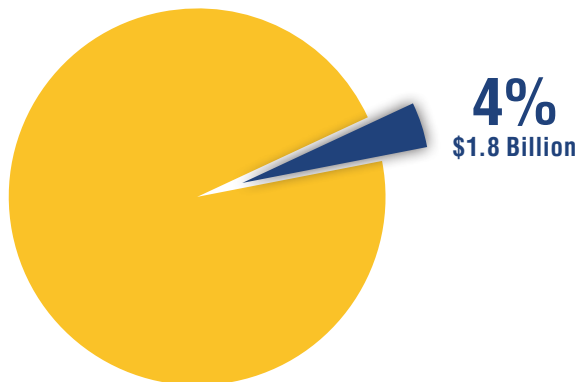
25



**\$151 MILLION TO \$200 MILLION**

Percentage of total CropLife 100 Revenues

**FACT:** This group of ag retailers used to be the largest not too many years ago. In 2024, only 10 members remain as company mergers and depressed sales moved ag retailers up or down the overall rankings. In 2025, a few companies at the top of this group are poised to move up the rankings, which will further reduce the number of ag retailers that fit into this sales range.



**TOTAL GROUP SALES:**  
**\$1.8 Billion**

**SHARE OF TOTAL CROPLIFE 100 SALES:**  
**4%**

**AVERAGE SALES PER RETAILER:**  
**\$180 Million**

Total = \$43.3 Billion



## \$101 Million to \$150 Million IN RETAIL SALES

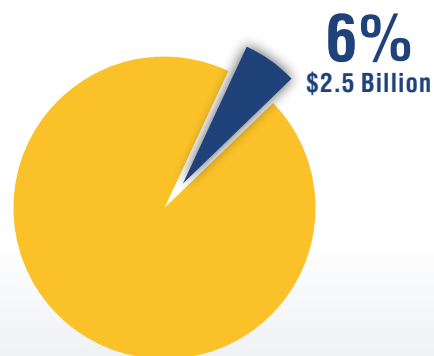
Rank/Company	Headquarters Location	# States Served	# Retail Outlets	Years in <i>CropLife 100</i>	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales
35 Frenchman Valley Farmers Coop	Imperial, NE	2	6	33	28%	62%	3%	7%
36 Alcivia Cooperative	Cottage Grove, WI	1	21	23	18%	64%	12%	6%
37 Titan Pro	Clear Lake, IA	8	139	7	94%	1%	5%	—
38 AgState	Cherokee, IA	1	40	18	26%	57%	16%	1%
39 The Andersons	Maumee, OH	3	10	28	23%	65%	4%	8%
40 Fertilzona	Casa Grande, AZ	2	10	36	34%	55%	11%	—
41 Asmus Farm Supply	Rake, IA	2	5	22	83%	11%	5%	1%
42 Diamond R. Fertilizer	Fort Pierce, FL	1	6	39	41%	56%	3%	—
43 Star of the West Milling	Frankenmuth, MI	6	33	31	19%	55%	17%	9%
44 Kova Fertilizer	Greensberg, IN	1	12	41	28%	63%	3%	6%
45 Heartland Co-op	West Des Moines, IA	3	75	28	23%	59%	10%	8%
46 Cooperative Farmers Elevator	Rock Valley, IA	3	25	9	29%	54%	15%	2%
47 Heritage Cooperative	Delaware, OH	1	17	9	21%	56%	15%	8%
48 Country Visions Coop	Brillion, WI	1	10	10	17%	56%	18%	9%
49 Novus Ag	Fort Collins, CO	4	15	9	32%	48%	12%	8%
50 CPI	Hastings, NE	1	25	15	21%	71%	4%	4%
51 Superior Ag	Huntingburg, IN	1	22	3	24%	61%	10%	5%
52 Crystal Valley Cooperative	Mankato, MN	2	16	5	21%	55%	15%	9%
53 Land View Fertilizer	Rupert, ID	3	9	31	30%	64%	5%	1%
54 Country Partners Cooperative	Gothenburg, NE	1	20	1	21%	71%	4%	4%

COOPERATIVES: BLUE DEALERSHIPS: WHITE

### \$101 MILLION TO \$150 MILLION

Percentage of total *CropLife 100* Revenues

**FACT:** This group saw a jump in overall market share among *CropLife 100* ag retailers, up from 5% in 2023 to 6% this year. Now containing 20 members (tied for the largest group among *CropLife 100* ag retailers), this could easily become the industry's largest sales block in 2025 with the addition of a few companies that just missed this sales range during the 2024 growing season.



TOTAL GROUP SALES:  
**\$2.5 Billion**

SHARE OF TOTAL *CROPLIFE 100* SALES:  
**6%**

AVERAGE SALES PER RETAILER:  
**\$126.4 Million**

Total = \$43.3 Billion

## \$51 Million to \$100 Million IN RETAIL SALES

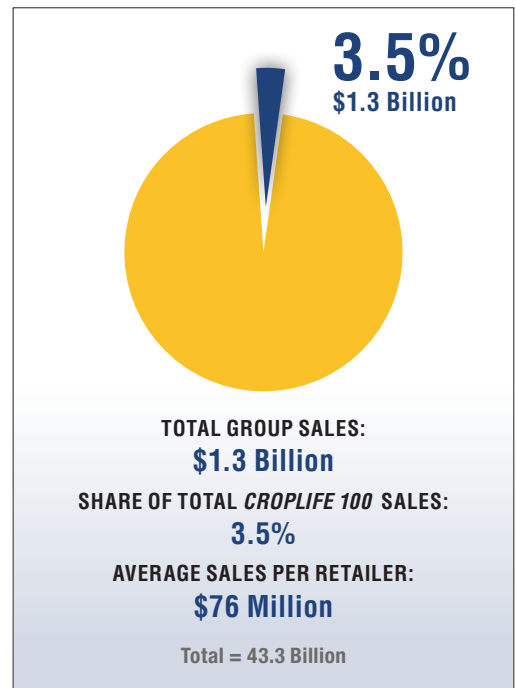
Rank/Company	Headquarters Location	# States Served	# Retail Outlets	Years in CropLife 100	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales	
55	Carolina Eastern-Vail	Salem, NY	7	8	35	17%	64%	12%	7%
56	Farm Service Co-op	Harlan, IA	1	8	27	20%	65%	7%	8%
57	AgriPartners	Clear Lake, SD	3	4	7	43%	13%	43%	1%
58	The Dune Companies	Yuma, AZ	2	3	37	37%	59%	—	4%
59	Valley United Co-op	Reynolds, ND	2	9	17	35%	44%	17%	4%
60	Howard Fertilizer & Chemical	Orlando, FL	2	7	6	18%	82%	—	—
61	Willard Agri-Service	Frederick, MD	3	4	41	13%	81%	—	6%
62	The DeLong Co.	Clinton, WI	2	9	41	16%	53%	24%	7%
63	Cooperative Elevator Co.	Pigeon, MI	2	13	34	26%	50%	19%	5%
64	GAR Bennett	Reedley, CA	1	1	28	58%	42%	—	—
65	AgRx	Oxnard, CA	1	5	28	37%	56%	—	7%
66	Butte County Rice Growers	Richvale, CA	1	3	31	58%	41%	1%	—
67	Pratum Co-op	Salem, OR	1	4	6	44%	50%	3%	3%
68	Five Star Cooperative	New Hampton, IA	1	18	1	27%	54%	13%	6%
69	Mountain View Co-op	Black Eagle, MT	1	26	21	36%	56%	4%	4%
70	Mercer Landmark	Celina, OH	1	20	2	26%	62%	7%	5%
71	American Plains Coop	Great Bend, KS	2	23	21	36%	48%	10%	6%
72	Marion Ag Services	St. Paul, OR	1	1	7	10%	80%	1%	9%
73	Pearl City Elevator	Lena, IL	2	8	13	23%	62%	8%	7%
74	Eldon C. Stutsman	Hills, IA	1	4	41	19%	74%	2%	5%

COOPERATIVES: BLUE    DEALERSHIPS: WHITE

### \$51 MILLION TO \$100 MILLION

Percentage of total CropLife 100 Revenues

**FACT:** Tied for the largest sales block among CropLife 100 ag retailers in 2024 with 20 members, the companies in this group are located across the entire U.S. — from New York to California and everywhere in between. In 2025, expect a few companies that fell out of this sales group in 2024 to return, making it the largest block of ag retailers within the CropLife 100.



## \$25 Million to \$50 Million IN RETAIL SALES

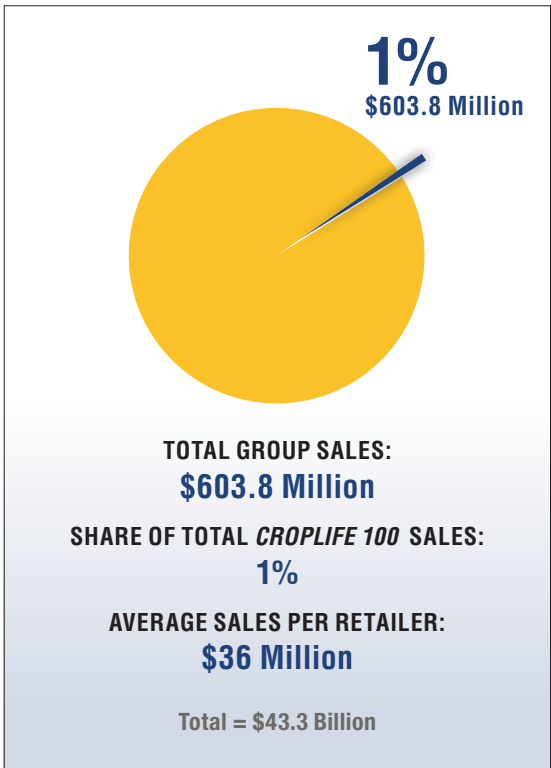
Rank/Company	Headquarters Location	# States Served	# Retail Outlets	Years in CropLife 100	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales	
75	Ricketts Farm Service	Salisbury, MO	1	7	5	36%	38%	10%	16%
76	Short Lane Ag Supply	Colby, WI	1	3	11	59%	23%	16%	2%
77	LMG Ag Products	Visalla, CA	1	1	1	87%	13%	—	—
78	Sims Fertilizer & Chemical	Osborne, KS	1	1	30	95%	2%	1%	2%
79	Griffin Fertilizer	Frostproof, FL	1	3	41	30%	70%	—	—
80	Farm Service Inc.	Walnut Ridge, AR	1	7	32	25%	56%	11%	8%
81	B and D Chemical	Cullom, IL	1	1	5	80%	17%	—	3%
82	Top Ag Coop	Okawville, IL	1	11	4	32%	45%	15%	8%
83	Legacy Cooperative	Scottsbluff, NE	1	12	28	39%	45%	11%	5%
84	The Mill	White Hall, MD	1	3	6	16%	72%	8%	4%
85	El Dorado Ag Products	Elkhart, TX	1	6	39	1%	97%	1%	1%
86	Delta Growers	Charleston, MO	1	3	32	26%	50%	18%	6%
87	TH Agri-Chemicals	Plainfield, WI	2	2	35	92%	7%	—	1%
88	Midwestern BioAg	Blue Mounds, WI	6	7	8	—	94%	3%	3%
89	Rockwood Ag Services	Brawley, CA	2	3	3	62%	35%	2%	1%
90	Valley Ag Supply	Gayville, SD	1	2	9	31%	53%	8%	8%
91	Burnt Prairie Fertilizer	Burnt Prairie, IL	1	1	4	36%	36%	22%	6%

COOPERATIVES: BLUE DEALERSHIPS: WHITE

### \$25 MILLION TO \$50 MILLION

Percentage of total CropLife 100 Revenues

**FACT:** This group did see plenty of positives in 2024, with overall revenues increasing from \$585.6 million in 2023 to \$603.8 million this year. Better still, the average sales per retailer here improved slightly, up almost \$200,000 from 2023.





### Less than \$25 Million IN RETAIL SALES

Rank/Company	Headquarters Location	# States Served	# Retail Outlets	Years in <i>CropLife 100</i>	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales	
92	Smith Fertilizer & Grain	Knoxville, IA	1	8	10	11%	38%	8%	43%
93	Jay-Mar	Plover, WI	1	1	39	8%	83%	7%	2%
94	O'Toole Companies	Letts, IA	1	3	2	36%	43%	8%	13%
95	Baltz Feed	Pocahontas, AR	2	3	19	29%	57%	9%	5%
96	Valley Farmers Supply	Worden, MT	1	4	5	37%	53%	6%	4%
97	New Ag Services	Hortonville, WI	1	2	3	18%	63%	12%	7%
98	BEI Hawaii	Honolulu, HI	1	6	19	5%	95%	—	—
99	Foster-Gardner	Coachalla, CA	1	1	30	45%	55%	—	—
100	Warner Fertilizer	Somerset, KY	1	11	40	8%	80%	9%	3%

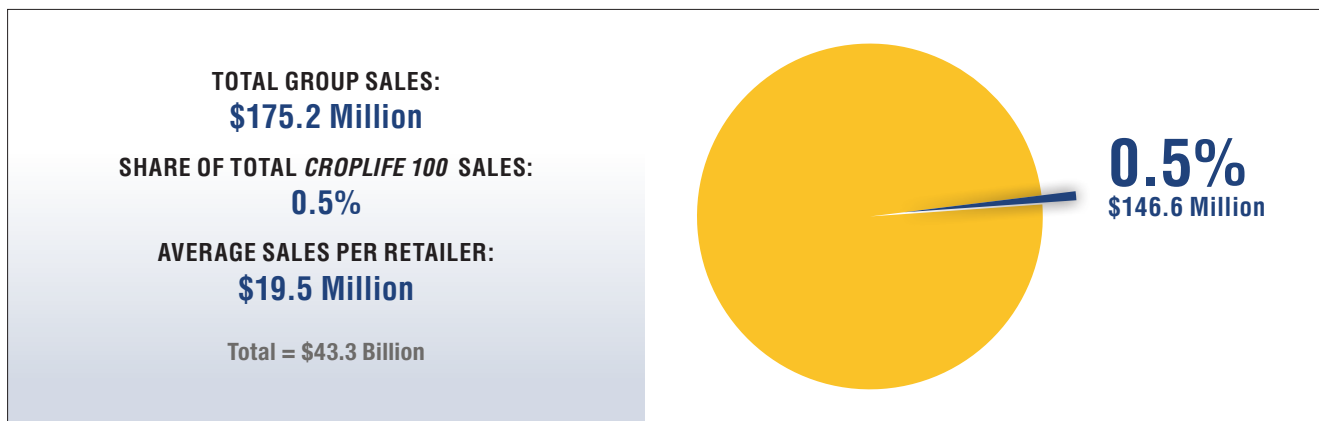
COOPERATIVES: BLUE DEALERSHIPS: WHITE

### LESS THAN \$25 MILLION

Percentage of total *CropLife 100* Revenues

**FACT:** After the \$1 billion club, this group now represents the smallest part of the *CropLife 100* with only nine members. Overall sales for these ag retailers did increase during 2024, however, up more than \$1 million per company to \$19.5 million. And

although small, this group shows no signs of disappearing from the *CropLife 100* rankings due to the fact many newer companies first enter the listings in this group before expanding their market presence/share.



To learn more about the U.S. ag retailers who compile this year's *CropLife 100* list, visit [CropLife.com/top100](http://CropLife.com/top100)

# The 'Big 4' Top 10

## TOP 10 Fertilizer

Total Sales/Top 10: **\$14 billion**  
Share of Total *CropLife 100* Fertilizer Sales: **70%**

- 1 Nutrien Ag Solutions
- 2 Helena Agri-Enterprises
- 3 GROWMARK
- 4 Simplot
- 5 CHS
- 6 Keystone Cooperative
- 7 GreenPoint Ag
- 8 Wilbur-Ellis
- 9 MFA
- 10 Central Valley Ag

## TOP 10 Crop Protection Products

Total Sales/Top 10: **\$11.3 billion**  
Share of Total *CropLife 100* Crop Protection Product Sales: **74%**

- 1 Nutrien Ag Solutions
- 2 Helena Agri-Enterprises
- 3 Simplot
- 4 GROWMARK
- 5 Wilbur-Ellis
- 6 GreenPoint Ag
- 7 Hefty Seed
- 8 Keystone Cooperative
- 9 CHS
- 10 Agtegra

## TOP 10 Seed

Total Sales/Top 10: **\$4.6 billion**  
Share of Total *CropLife 100* Seed Sales: **81%**

- 1 Nutrien Ag Solutions
- 2 Helena Agri-Enterprises
- 3 GROWMARK
- 4 Simplot
- 5 GreenPoint Ag
- 6 CHS
- 7 Wilbur-Ellis
- 8 Hefty Seed
- 9 Keystone Cooperative
- 10 Agtegra

## TOP 10 Custom Application

Total Sales/Top 10: **\$1.4 billion**  
Share of Total *CropLife 100* Custom Application Sales: **76%**

- 1 Nutrien Ag Solutions
- 2 GROWMARK
- 3 Helena Agri-Enterprises
- 4 Simplot
- 5 CHS
- 6 Keystone Cooperative
- 7 Wilbur-Ellis
- 8 Agtegra
- 9 MFA
- 10 NEW Cooperative

# Sprayer Fleets Diversified in 2024

Although the Big Three self-propelled sprayer manufacturers still dominate the marketplace, smaller players did make some gains this past year.

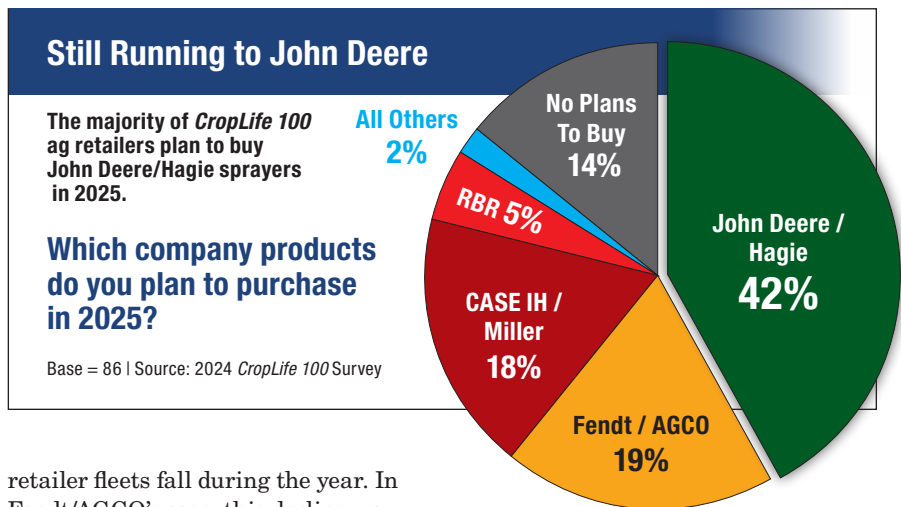
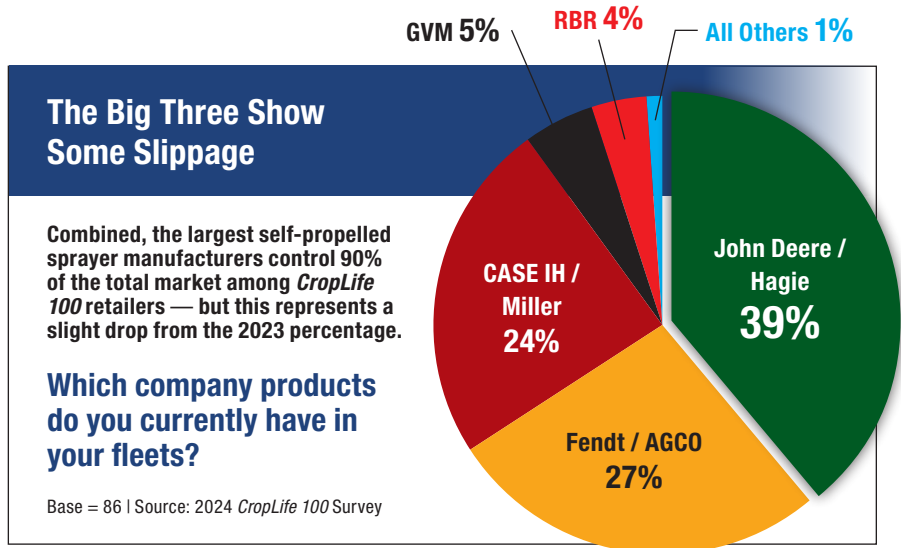
BY ERIC SFILIGOJ  
EDITOR

**B**Y MOST ACCOUNTS, the 2024 growing season was less than stellar for the nation's self-propelled equipment manufacturers. Among the major players in particular — John Deere, Fendt/AGCO, and Case IH/Miller/New Holland — sales started out the year slow and remained that way for the majority of the calendar. Indeed, during the fall months, with quarterly sales dropping at most companies, rounds of worker layoffs dominated the news for these equipment makers.

And in one sense, this market sluggishness in new self-propelled sprayer demand shouldn't have been a complete surprise. One year ago, when *CropLife*® magazine was compiling the data from its 2023 *CropLife 100* survey of the nation's top ag retailers, 16% of respondents indicated that, because of volatile agricultural market conditions, their companies planned to "sit out" the 2024 growing season when it came to purchasing new self-propelled sprayers for their fleets.

Despite this negative news, however, one of the Big Three sprayer manufacturers did have some good news to share during the 2024 calendar year, managing to grow its overall market share. According to the 2024 *CropLife 100* survey, 39% of the nation's top ag retailers with sprayer fleets own John Deere models. This represented a 1% increase from the findings of the 2023 *CropLife 100* survey, when this figure was 38%.

For the other two Big Three equipment makers, the 2024 news was more somber. Both Fendt/AGCO and Case IH/Miller/New Holland saw their market shares among *CropLife 100* ag



retailer fleets fall during the year. In Fendt/AGCO's case, this decline was 2%, from 29% in 2023 to 27%. For Case IH/Miller/New Holland, the drop was 1%, from 25% in 2023 to 24%.

#### Smaller Company Good News

Still, there was some good news for self-propelled sprayer manufacturers in 2024 — at least for those with smaller market footprints compared with the Big Three. For several years

now, the Big Three have steadily increased their overall market shares for self-propelled sprayers among the nation's top ag retailers. In fact, during the 2023 growing season, the combined market share for John Deere, Fendt/AGCO, and Case IH/Miller/New Holland topped 92%. Much of this growth came at



the expense of smaller self-propelled sprayers makers.

But according to the data from the 2024 *CropLife 100* survey, smaller self-propelled sprayer manufacturers managed to make some market share gains from the Big Three among the nation's top ag retailers. Based upon the results, these smaller players hold an overall 10% market share among *CropLife 100* sprayer fleets, an improvement of 2% from the 2023 figure.

Of particular note was the performance of RBR Enterprise. According to 2024 *CropLife 100* survey, the Byhalia, MS-based sprayer/spreader manufacturer grew its overall market share of *CropLife 100* ag retailers' self-propelled sprayer fleets from 1% to 4%.

"Being a mid-sized company, we are able to support our customer base," said Jason Eaton, COO at RBR, during a recent interview with *CropLife*.

#### Future Purchases

Even better news for smaller equipment manufacturers such as RBR came from the question of which self-propelled sprayer manufacturers *CropLife 100* ag

### Green Dominates Service

According to *CropLife 100* ag retailers, John Deere remains the best service provider.

#### Which company provides the best service?

Base = 86 | Source: 2024 *CropLife 100* Survey

CASE IH / Miller

12%

Fendt / AGCO

19%

John Deere / Hagie

72%

retailers plan to buy products from during the 2025 growing season.

According to the 2024 survey, 5% plan to look specifically to RBR for additions to their fleets next year. Another 2% plan to buy sprayers from such companies as GVM, Horsch, and Oxbo.

Among the Big Three players, a majority of respondents to the 2024 *CropLife 100* survey (42%) say they plan to make sprayer purchases from John Deere. For Fendt/AGCO, the percentage of the nation's top ag retailers planning to buy their models stands at 19%. Case IH/Miller/New Holland buyers are slightly behind this mark going into the 2025 growing season, with 18% of ag retailers

planning to buy self-propelled sprayers from these companies.

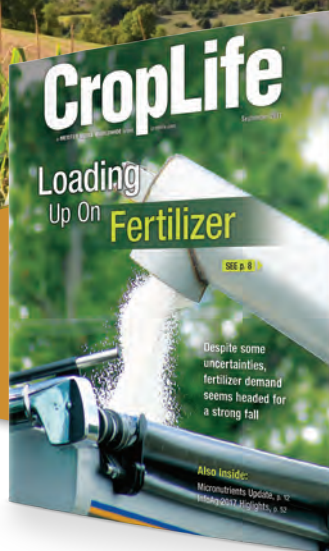
Perhaps most importantly, the number of the nation's top ag retailers that are planning to not make any self-propelled sprayers purchases in 2025 is falling. As we pointed out earlier in this article, the 2023 *CropLife 100* survey had 16% of respondents not planning to buy any new spraying going into the 2024 growing season. However, according to the 2024 *CropLife* survey data, this percentage will fall to 14% for the upcoming year. For ag equipment makers looking for some sales figures rebound during 2025, this 2% drop among non-buyers should represent some welcome news indeed.

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# In 2024, Technology Experiences a 'Pause'

With overall sales down, can ag technology recover in 2025?

BY ERIC SFILIGOJ  
EDITOR

EVERY YEAR WHEN *CROPLIFE*® MAGAZINE compiles the results from its annual *CropLife 100* survey of the nation's top ag retailers, there is always at least one big surprise in the numbers. For the past few years, this "survey surprise" has tended to be positive. For instance, in 2022, 99 out of the *CropLife 100* ag retailers reported year-over-year revenue growth from the year before. In 2023, the seed category saw its overall sales rebound following several years of declines.

In the 2024 *CropLife 100* survey, however, the news was of a negative variety. For evidence, consider the tale of the ag technology sector.

Now throughout the past two growing seasons, there has been plenty of marketplace "buzz" regarding ag tech-

nology. In mid-2023, as the Federal Aviation Administration released new guidelines for operation, application drone activity among ag retailers has steadily increased. Furthermore, major equipment manufacturers such as John Deere, Raven Industries, and Fendt/AGCO has dabbled in all sorts of new high-tech product launches. These have included numerous systems featuring autonomous operations or powered by advanced artificial intelligence (AI). Indeed, many of these products have been on display at dozens of the ag equipment industry's biggest winter and summer trade shows, including the National Farm Machinery Show, Farm Progress, the Midwest AG Industries Exposition (MAGIE).

## Depressed Revenues

However, despite all this activity in the ag technology sector, sales for

these products among the nation's top ag retailers have not grown. Quite the opposite, in fact.

According to data collected in the 2024 *CropLife 100* survey, ag technology product sales this year topped only \$338.1 million. This represented a surprising 59% decline from the sales figure ag technology products recorded during the 2023 growing season, when the sector topped \$815 million.

So, what happened? According to survey respondents, two explanations come to mind. The first ties back to grower-customer revenues. Based upon data from the USDA, net farm income was expected to decline for 2024, down 4.4% vs. 2023 to \$140 billion. Many market watchers say that whenever farmer incomes drop, "ag technology purchases are the first things cut."

The second explanation is a little less bleak and has to do with more semantics than sales figures. Since many of the newest ag technologies are for application work, a portion of the nation's ag retailers have included these sales into their custom application revenues. In fact, at least one dozen *CropLife 100* ag retailers noted this bookkeeping position on their 2024 survey forms. So ag technology sales may be stronger than the overall numbers show for this year's growing season.

Can the ag technology sector recover some in 2025? According to the nation's top ag retailers, the outlook isn't that bright. Based upon the survey results, only 9% of respondents see ag technology adoption next year being "huge." Another 36% believe growth in this sector will remain "small." The vast majority, 55%, think "it's too early to tell" how the ag technology sector will perform in 2025.

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# A 'Good News/Bad News' Kind of Year for Crop Protection

Although crop protection product sales struggled overall during 2024, the category did grow its market share among crop inputs – and a pair of segments performed better than expected.

**BY ERIC SFILIGOJ**  
EDITOR

**T**HE CROP PROTECTION PRODUCTS CATEGORY had a really good year during the 2023 growing season. With the industry significantly recovered from the supply chain headaches of 2021 and 2022, overall revenues topped at almost \$16 billion. It seemed as if the category was poised for similar positive results during 2024.

“If you look back two to three years, the world was suffering from many historic events, such as COVID,” David Elser, Region Head, North America at UPL NA, Inc., told *CropLife*® magazine back during the 2024 Commodity Classic show in March. “This caused substantial supply chain disruptions. This made everyone in agriculture — from growers to suppliers to ag

retailers — to think about buying everything they needed to do business 15 to 18 months in advance, rather than just a few weeks forward.”

But this continued category growth didn't happen, unfortunately. According to the 2024 *CropLife 100* survey, the nation's top ag retailers experienced a 2.6% revenue decline during this calendar year with sales topping out at \$15.3 billion. According to most industry watchers, the very phenomenon Elser described — buying more products in advance, “just in case” — meant ag retailers and their grower-customers were well stocked on crop protection products for the current growing season.

However, all of the news for the crop protection products category wasn't bad in 2024. Because the category didn't decline as rapidly as other crop inputs/services catego-

ries among ag retailers, the overall market share did improve. For 2024, crop protection products now hold a 36% market share among *CropLife 100* ag retailers compared with other crop inputs such as fertilizer and seed. This represented a 2% improvement from the 34% market share the category held according to the 2023 *CropLife 100* survey.

*Continued ...*

## Tempered Growth

The majority of ag retailers still saw growth in crop protection, but it wasn't as robust as in 2023.

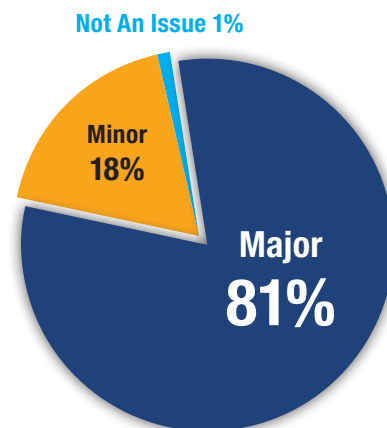
SEGMENT	UP	FLAT	DOWN
Herbicides	44%	15%	41%
Fungicides	45%	22%	33%
Insecticides	51%	26%	23%
Biologicals	63%	27%	10%

Base = 96 | Source: 2024 *CropLife 100* Survey

## Resistant Weeds Pressures Lessons, Slightly

Compared with 2023, 2% fewer ag retailers said resistant weeds are a major problem for their customers.

How would you describe resistant weed pressures in your area?



Base = 95 | Source: 2024 *CropLife 100* Survey



Continued ...

**Slower Growth in Herbicides, Fungicides**

Among the four individual segments that make up the crop protection products category, all recorded higher sales volumes than flat or down revenues. However, compared with the percentages recorded for these segments during 2023 — when “up sales” percentages ranged between 57% and 75% — this year’s numbers were significantly lower.

For example, consider herbicides. In the 2023 *CropLife 100* survey, 65% of respondents said their sales in this segment grew between 1% and more than 5%. In 2024, only 44% of *CropLife 100* ag retailers reported these kinds of sales increases for their operations. An almost similar percentage — 41% — said their herbicide revenues in 2024 declined between 1% and more than 5%. The remaining 15% had flat sales in herbicides for the year.

Perhaps a drop in herbicide resistant weeds pressures also kept

this segment’s numbers from looking better in 2024. Based upon data from the 2024 *CropLife 100* survey, 77% of respondents described herbicide-resistant weeds as a “major problem” in their areas. This was a decline of 2% from the findings in the 2023 *CropLife 100* survey, however.

It was a similar story for another crop protection products segment, fungicides. In 2023, 57% of *CropLife 100* ag retailers said their sales in this segment grew between 1% and more than 5%. But according to the 2024 *CropLife 100* survey, this percentage was only 45% for this year’s growing season. Instead, 22% of respondents said their fungicides revenues were flat for 2024 and 33% reported sales declines between 1% and more than 5%.

**Insecticides, Biologicals Lead the Way**

On the plus side, the other two crop protection products segments did perform better for 2024. For instance,

in insecticides, slightly more than half of the nation’s top ag retailers — 51% — indicated that their revenues in this segment improved between 1% and more than 5% for the year. Twenty-six percent of survey respondents said their insecticide sales for this year were the same as during the 2023 growing season. The remaining 23% recorded sales declines of between 1% and more than 5% for their insecticide offerings in 2024.

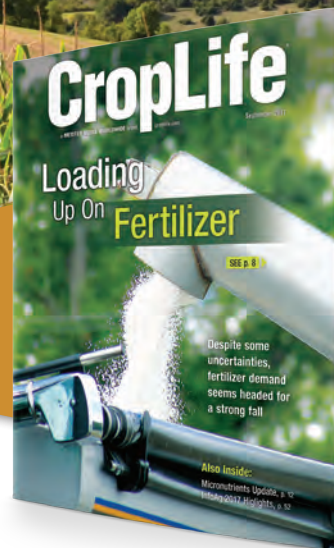
The “revenue winner trophy” for 2024 among the crop protection product segments belonged to the newest one — biologicals. According to the 2024 *CropLife 100* survey, 63% of the nation’s top ag retailers saw sales increases between 1% and more than 5% for their biological offerings for grower-customers. Twenty-seven percent said their biologicals revenues for the year were flat compared with 2023. Significantly, only 10% of respondents said their biologicals sales actually declined between 1% and more than 5% for the year.

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# For Fertilizer, a Contrast in Numbers

Fertilizer revenues took a hit during the 2024 growing season, but this alone doesn't tell the whole story for the category.

Photo: Nuan / stock.adobe.com

BY ERIC SFILIGOJ  
EDITOR

**A**S THE LARGEST CATEGORY AMONG crop inputs/services for the majority of *CropLife 100* ag retailers, fertilizer trends tend to overshadow overall agricultural market fortunes. And this certainly proved to be the case during the 2024 growing season.

According to data collected in the 2024 *CropLife 100* survey, the fertilizer category saw its overall revenues significantly decline. Sales dropped from \$22.4 billion in 2023 to \$19.9 billion this year – an 11% decrease, or \$2.5 billion. Furthermore, this marked the most significant year-over-year decrease the fertilizer category has experienced since the 2000s began.

Not surprisingly, with this revenue decline, the fertilizer category saw its overall market share of all crop inputs/services among *CropLife 100* ag retailers drop as well. In 2024, fertilizer accounted for 46% market share, down 2% from 2023. Not too long ago (as recently as 2022, to be exact), the fertilizer category held a 51% market share among all crop inputs/services within the *CropLife 100*.

However, looking at the revenue numbers only tells part of the story for the fertilizer category in 2024. Indeed, according to many of the nation's top ag retailers, their fertilizer volumes were almost identical to the ones they recorded during the 2023 growing season. Instead, the financial misfortunes

### Acreage Numbers About the Same

Most *CropLife 100* ag retailers think corn and soybean acres will be unchanged in 2025.

#### What are your estimates for the acreage mix in 2025?

SEGMENT	UP	FLAT	DOWN
Corn	29%	39%	32%
Soybeans	44%	46%	10%

Base = 94 | Source: 2024 *CropLife 100* Survey

### Phosphorus Remains a Harder Sell

Among the macronutrients, *CropLife 100* ag retailers said phosphorus more challenging to sell in 2024.

#### How would you rate selling fertilizer products in 2024?

Macronutrient	Very Challenging	More Challenging Than Normal	Not Usually Challenging
Nitrogen	12%	35%	53%
Phosphorus	12%	46%	38%
Potassium	3%	17%	80%

Base = 95 | Source: 2024 *CropLife 100* Survey

for crop nutrients in 2024 stemmed from prices.

“Yes, the cost of the fertilizer for

nitrogen and potash have come down significantly in the past year – not so much for phosphates,” says Rob



Clayton, Senior Vice President, Retail North America for Nutrien Ag Solutions. “But yes, the volumes of fertilizer being used by growers was similar to what we saw in 2023.”

And the numbers support this view. Back in 2022, as the agricultural industry (and entire globe, for that matter) finally emerged from the shadow of the pandemic, tight fertilizer supplies saw prices for many macronutrients topping \$1,500 per ton. As demand/supply began to moderate during 2023, prices dropped back by 50% to 60% for many fertilizer products. For example, nitrogen-based fertilizers that were selling for \$1,000 per ton in 2022 could be had for \$500 to \$600 per ton by the time the 2023 fall application season rolled around. For 2024, these same crop nutrients were selling for \$400 to \$500 per ton – in line with their pre-COVID costs.

### Not That Difficult

For further evidence that the drop in overall fertilizer prices caused the category’s woes during 2024, consider how difficult or not the nation’s top ag retailers found selling macronutrients to their grower-customers was during the growing season. According to the 2024 CropLife 100 survey, potassium was the easiest sell for the year. Overall, 80% of respondents said convincing growers to purchase potassium was “not usually challenging.” Seventeen percent said potassium sales in 2024 were “more challenging than usual.” Only 3% found selling this product “very challenging.”

Nitrogen fertilizer showed similar trends. For these products, 53% of CropLife 100 ag retailers said sales were “not usually challenging;” 35% said they were “more challenging than usual;” and 12% said they were “very challenging.”

For phosphorus fertilizers, however, the majority of respondents – 46% – said this segment was “more challenging than usual” to sell in 2024, with 16% saying this was “very challenging.” This was probably due in part to prices for this segment not declining as quickly as those for nitrogen and potassium during the year. The remaining 38% didn’t see challenges selling phosphorus to their grower-customers.

Going into the 2025 growing season, ag retailers are hopeful that the fertilizer category will experience a turn-around of sorts. As Nutrien’s Clayton explains: “The good news for 2025 is that the crop this year was bigger, so there was a lot of nutrient removal from soils during 2024. So, what we are seeing so far is growers are not pulling back on fertilizer applications. The good growers are saying ‘yield is going to be way more important to me

in 2025 than they were in 2024. I can’t have low commodity prices times a low yield, so I have to keep more fertilizer applications strong.”

In terms of acreage numbers for next year, CropLife 100 ag retailers expect corn/soybeans percentages to remain fairly constant from 2024. For corn, 39% foresee the same amount of corn plantings next year. For soybeans, 46% predict similar acreage numbers for 2025.

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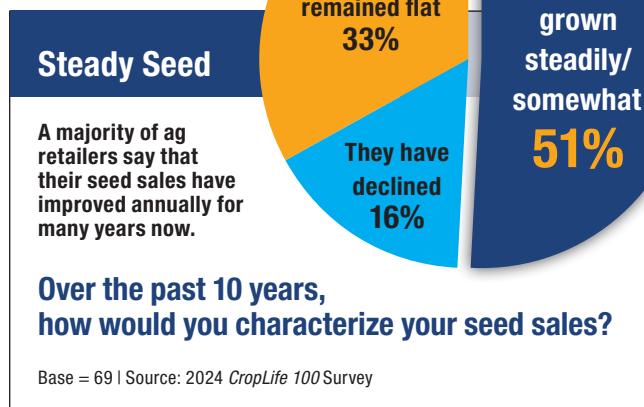
# Seed Holds Steady

The seed category held onto the gains the category made during 2023. Will this remain the case in the new growing season as well?

BY ERIC SFILIGOJ  
EDITOR

FOR THE SEED CATEGORY among *CropLife 100* ag retailers, 2024 could be considered a triumph — at least compared with the rest of the crop inputs/services categories. According to the 2024 *CropLife 100* survey, overall sales for the category remained flat vs. the 2023 revenues — coming in at just over \$5.8 billion each year. And since every other category recorded a sales decline during 2024 among the nation's top ag retailers, the seed category did manage to increase its overall market share among all other crop inputs/services. In 2024, according to the survey results, this rose from 12% in 2023 to 13% this year.

According to market watchers, the seed category benefited from not experiencing the same supply chain disruptions/wild market price swings that have consistently dogged categories such as crop protection products and fertilizer since the end of COVID pandemic lockdowns. This kept prices and demand steady throughout each of the past



few growing seasons for ag retailers. Furthermore, overall, ag retailers say their seed revenues over the past decade have remained fairly consistent. According to data from the 2024 *CropLife 100* survey, 51% of the nation's top ag retailers that sell seed say their sales have grown “steadily” or “somewhat” since 2014. Another 33% indicated that the seed category revenues for their operations were relatively flat during this same time frame. Significantly, only 16% of respondents said their seed category sales declined over this time span.

## What Motivates Seed Purchases?

In terms of what motivates seed purchases from *CropLife 100* ag retailers, the 2024 survey results indicate that there are two factors that drive the majority of sales. According to the 2024 *CropLife 100* survey, 51% of grower-customers make their seed purchases from the nation's top ag retailers based upon the type of seed variety they need/want for their crop fields.

After variety type, a distant second reason for grower-customers to buy the seeds they do ties back to location conditions — specifically soil type. This was cited by 21% of *CropLife 100* ag retailers for why their seed customers buy the seeds they do.

As for the remaining 18% of respondents, they indicated that their seed customers buy products based upon such factors as weather and “it's the seed type they have always bought, so our company keeps that one in stock.”

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