THE 42ND CropLife 100

Examining all the numbers, looking for some guidance going into the 2026 growing season.

NO MATTER WHAT SET OF NUMBERS YOU ARE LOOKING AT, 2025 has been a tough growing season for ag retailers and their grower-customers. With higher crop inputs prices and lower commodity prices the norm, margins for the entire agricultural industry are tighter than they have ever been.

According to Leah Anderson, President at WinField United, this has resulted in many tough decisions being made at the farmgate – but these decisions have come at a cost, with yield losses tied to issues such as Southern rust, where fungicide use could have made a difference.

"This cautious purchasing behavior has naturally impacted ag retailers," says Anderson. "Retailers are responding by sharpening their focus on operational efficiency, strategic partnerships, and long-term resilience. Our role at WinField United is to help growers make every dollar count — whether that's through differential agronomic placement recommendations that drive profitable returns, or through advanced data and insights that help our system optimize things like demand sensing and forecasting to drive greater efficiency."

Looking forward to 2026, WinField United anticipates the ag market will continue to face a complex mix of persistent and emerging challenges. This will include continuing low commodity prices, high input costs, lack of innovation, complex inefficient supply chains, shrinking access to foreign markets, and ongoing weather volatility.

Worse still, adds Anderson, this could only be a prelude of how things will be for agriculture for the foreseeable future.

"This isn't just another cycle after which we will go back to how it was — it's the new reality," she warns. "Growers are under immense pressure to make every dollar count, and retailers are being asked to do more with less."

To help, Anderson says that WinField United is putting its systems data to work, using proprietary tools and AI-driven forecasting to improve demand sensing, optimize product mix, and support smarter decisions across the supply chain. "Our backwards-integrated position, enabled through our Omnium manufacturing platform, is helping us unlock deeper efficiency opportunities by aligning manufacturing and retail more closely," she says.

And even more use of Smart Tech systems is on the way to help ag retailers and their grower-customers next year.

"One initiative I'm especially excited to work on in the coming year is our soon-to-launch AI assistant," says Anderson. "One of the biggest challenges faced by local ag retail is the constant churn of talent. This mobile tool equips retail sellers with instant access to 20-plus years of applied research, helping them deliver more efficient, accurate, and outcome-driven recommendations to farmers.

"We're also actively modernizing our Answer Plots to focus more on emerging technologies, volatile weather environments, and leveraging more on-farm trials with growers," she continues. "Technologies such as AI and drones can help reduce costs, forecast weather and insects, predict inventory needs, and improve product demand flow. These tools save time and labor, reduce wear and tear on equipment, and streamline operations across the board."

No matter what happens in 2026 and beyond, Anderson believes the agricultural sector will persevere.

"Farmer resiliency remains the foundation of this industry," she says. "We're proud to stand alongside our retail owners and the growers they serve, helping them navigate what's next with confidence, clarity, and a shared commitment to long-term success."

The Definitive Fun with Numbers Report

The annual update from the nation's top ag retailers provides a comprehensive picture of the state of agriculture in 2025.

Photo: Iamyai / stock.adobe.com

BY ERIC SFILIGOJ
EDITOR

FOR ANYONE PAYING ATTENTION TO THE AGRICULTURAL INDUSTRY these past 12 months, it should be painfully clear that one variable has dominated the news – numbers. Depending upon the source (or day), these numbers could look pretty rosy (more than $170 billion in net farmer income) to terribly bleak ($0 in U.S. soybean exports to China through the end of September).

Here at *CropLife®Magazine*, we love to play with numbers, too. For almost a decade now, our weekly videocast, **CropLife Retail Week**, has featured a segment at the end of each episode called "Fun with Numbers." This offers co-hosts (and guests) the chance to see how well they've kept up with the myriad agricultural figures that appear each week across the worldwide web network of sources by selecting the correct answer from four choices.

In addition, for more than 40 years now, **CropLife** has annually polled the nation's top ag retailers through its **CropLife 100** survey to gauge the health of the entire industry. Naturally, numbers are a huge part of this effort.

So, with this introduction to the numbers question out of the way, what kind of numbers – both positive and negative – did the **CropLife**

Adjuvants, Micronutrients as Top Sales Gainers

Among the sub-segments in 2025, adjuvants and micronutrients had the largest revenue gains.

Segment	Sales Up 1% to 5%	Sales Flat	Sales Down 1% to 5%
Micronutrients	**64%**	14%	22%
Adjuvants	**60%**	18%	22%
Biologicals	**56%**	29%	15%
Fertilizer	**55%**	8%	31%
Crop Protection Products	**48%**	10%	42%
Seed Treatment	**47%**	35%	16%
Precision Agriculture	**46%**	38%	16%
Custom Application	**41%**	31%	28%
Biotech Seed	32%	**44%**	24%
Traditional Seed	15%	**64%**	21%

Base = 97 | Source: 2025 **CropLife 100** survey

100 ag retailers record in their computer spreadsheets in 2025? And more importantly, will any of these improve for the upcoming 2026 growing season, or do they indicate harder times ahead?

Let's dive in and find out!

Given how much uncertainty plagued the agricultural marketplace during the whole of 2025, the nation's top ag retailers performed quite well during this year's growing season – comparatively speaking. According to the 2025 **CropLife 100** survey, the top ag retailers recorded overall revenues of $42.9 billion for the year. And while this did mark a downturn from the industry's 2024 revenue ($43.3 billion), this 0.9% overall decline in sales wasn't that significant.

For the purposes of the **CropLife 100** survey, **CropLife** asks the nation's top ag retailers to share with us how the revenues did in four distinct categories – fertilizer, crop protection products, seed, and custom application (which includes ag technology, i.e., Smart Tech). These are presented here in descending order of their respective market shares compared with all the other categories. Normally, whenever the largest categories perform well, the overall market does as well.

And that's what happened in 2025. According to the **CropLife 100** survey data, both the fertilizer and crop protection products categories held their own during the 2025 growing season in terms of sales. In fact, sales in both categories were mirror images of the 2024 growing season figures.

For fertilizer, 2025 sales topped $19.9 billion according to **CropLife 100** ag retailers – identical to the figure the category managed for the marketplace during 2024. Likewise, crop protection product sales were similar – revenues for 2025 for this category hit $15.3 billion – the same figure achieved by the category during the 2024 growing season. Not surprisingly, both categories maintained their overall 2024 market shares of all crop inputs/services sales among top ag retailers in 2025, at 46% and 36% respectively.

For the third largest category of crop inputs/services – seed – the story of 2025 was a different and less positive.

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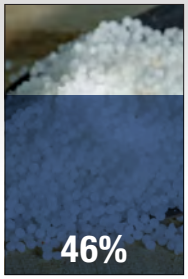
All Categories Were Basically Flat

Among the four crop inputs/services categories, two saw revenue numbers nearly identical to 2024. The other two recorded slight sales declines.

Categories by Sales/Market Share (In Billions)



FERTILIZER
$19.9 Billion

CROP PROTECTION PRODUCTS
$15.3 Billion

SEED
$5.7 Billion

CUSTOM APPLICATION
$2 Billion

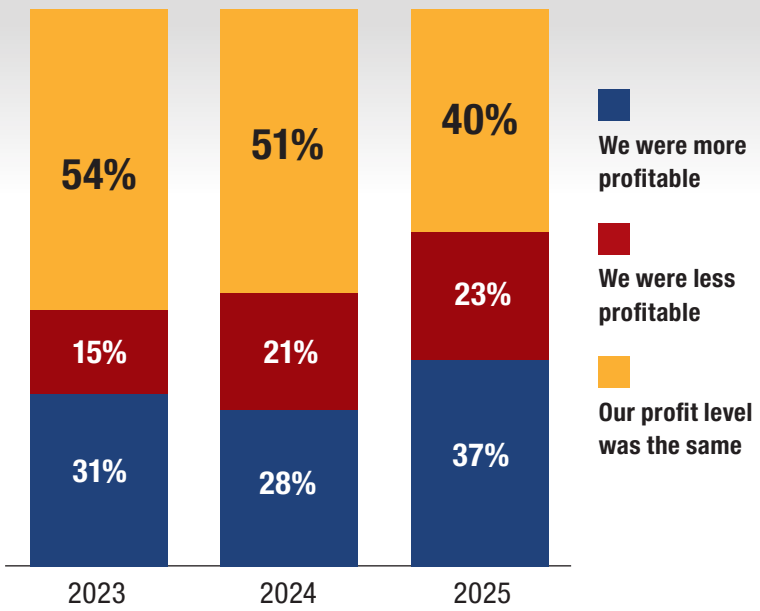
Total = $42.9 Billion

Base = 100 | Source: 2025 **CropLife 100** Survey

Profit Levels Mostly Flat

During 2025, a slight majority of ag retailers saw the same profit levels as they did in 2024.

Level of Profitability among CropLife 100 Retailers



Base = 93 | Source: 2025 **CropLife 100** Survey

Photos: Sensay, Soru Epotok. mech, Dusan Kostic / stock.adobe.com

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By the numbers, **CropLife 100** ag retailers saw their seed sales during this past growing season decline slightly, falling 1.7% to $5.7 billion. Nonetheless, because this decline in sales wasn't that large, the seed category still managed to maintain its overall market share among top ag retailers' crop inputs/services at 13%.

Among the four categories, the hardest hit in 2025 was custom application. Here, according to the 2025 **CropLife 100** survey, overall revenues declined $300 million, from $2.3 billion in 2024 to $2 billion this year – a 13% drop. Still, given how flat the rest of the marketplace was, the custom application category managed to hold its overall crop inputs/services market share steady at 5%.

The Sub-Segments Review

Besides the four major crop inputs/services categories, the annual **CropLife 100** survey also tries to gauge how some of the sub-segments of the marketplace performed during the current calendar year. Here, as was the case with the four major categories, crop nutrition and crop protection products led the way in terms of sales performance.

For the 10 segments tracked in this portion of the **CropLife 100** survey, respondents are asked to tell us how each performed during the current growing season in terms of revenues. There are three options: 1) Sales were up between 1% and more than 5%; 2) Sales were down between 1% and more than 5%; and 3) Sales were unchanged from the prior year. Any segment that scores better than 50% for sales increases is considered a success for the year. And in 2025, four of the 10 segments achieved this mark.

Leading the way was the micronutrients segment. Here, according to the 2025 **CropLife 100** survey, 64% of respondents had sales increases of these products between 1% and more than 5%. Adjuvants weren't far behind, with 60% of the nation's top ag retailers seeing sales increases for these products during the year.

The other two segments to achieve more than 50% of their sales growing during 2025 were virtually tied. According to the 2025 **CropLife 100** survey, 56% of ag retailers saw their biologicals sales grow between 1% and more than 5%. Meanwhile, 55% of respondents said their fertilizer revenues grew by the same percentages during the 2025 growing season.

Key Concerns for 2026

With the numbers for the 2025 growing season now in the books, it's time to speculate on what kind of numbers the industry might see once the 2026 growing season gets underway. On this question, a big majority of the nation's ag retailers are very, very troubled by all the negative numbers being brandied about for agriculture at the moment.

When asked about their chief

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concern about the agricultural industry going into 2026, almost three-fourths (71%) listed price volatility as the major issue. Given the answers from the 2025 **CropLife 100** survey, this ranged from everything imaginable – from record low commodity prices for corn, soybeans, wheat, rice, and cotton to high crop input prices depressing retail sales to financial instability/accounts receivable issues at the farmgate.

Significantly, this represented a big jump in percentage for price volatility from the 2024 **CropLife 100** survey. Last year, slightly over half of the nation's top ag retailers (54%) listed price volatility as their major concern going into the 2025 growing season.

In second place among chief concerns was a new item – tariffs. By now, most in the agricultural marketplace are aware of how negatively trade tariffs have depressed U.S. agricultural export sales (with one-time major importer China purchasing no soybeans through the end of September 2025). Overall, 12% of respondents listed this as their chief concern going into next year's growing season.

Finishing a close third behind tariffs was labor – as in finding/keeping good employees. For years, this issue was the No. 1 concern year in and year out for **CropLife 100** ag retailers. However, it's been overshadowed by other concerns over the past two years.

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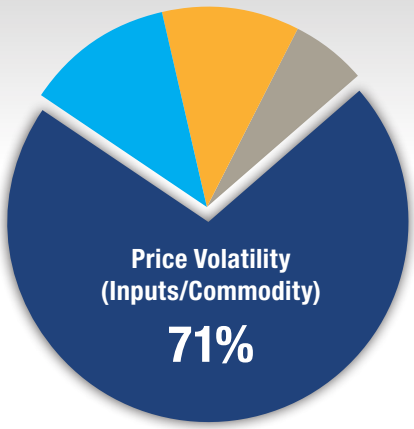
Prices Dominate Key Concerns

Among **CropLife 100** ag retailers, prices, for everything from commodities to inputs, were the major concern going into 2026.

What are the chief concerns of your business, today and going forward?



Tariffs	12%
Labor	11%
All Others*	6%

**(Includes Water, Regulations, and Legislative Concerns)*

Base = 88 | Source: 2025 **CropLife 100** Survey

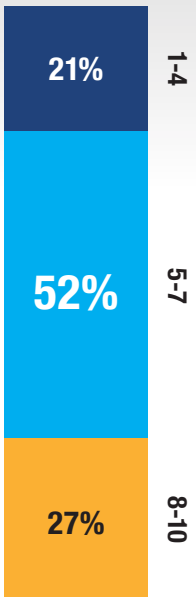
Continued from p.10

But to end this report on a high note of sorts, all of these concerns and flat revenue numbers for 2025 haven't dampened the majority of ag retailers' outlook for the 2026 growing season. When **CropLife 100** ag retailers were asked on the 2025 survey to rank their level of confidence in the financial outlook for 2026 on a scale of one to 10 (one being low confidence, 10 being high), the majority (52%) believe that next year will rate between five and seven in terms of revenue. Another 27% think that next year's growing season will rate between eight and 10. Only 21% think the 2026 growing season will be poor, rating between one and four.

A Middle-of-the-Road Outlook

Among CropLife 100 ag retailers, 52% predict an okay sales year in 2026.

Please rate your level of confidence in the upcoming growing season on a scale of one to 10
(one = low confidence, 10 = high confidence)



Base = 96 | Source: 2025 **CropLife 100** Survey

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 the time they spent filling out our annual survey form. On the following pages, you will find the 2025 **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.

2025 Company Rankings

About the Research

COMPANIES INCLUDED IN the 2025 **CropLife 100** listings were limited to independent dealerships and cooperatives that offer fertilizer, crop protection products, seed, and custom application services. The figures do not include a host of services, such as data management, consulting/scouting, or grain elevator revenues. Dealerships and cooperatives are ranked in order by total sales in their respective groups.

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

Look for our TOP 10 lists on page 27-28.

Greater than $1 Billion IN RETAIL SALES

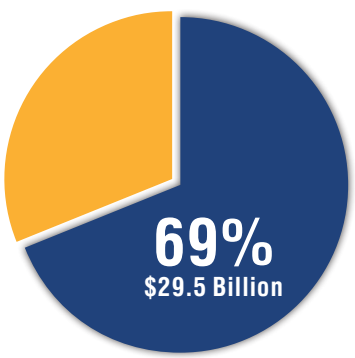
Rank	Company	Headquarters Location	# States Served	# Retail Outlets	Years in CropLife 100	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales
1	Nutrien Ag Solutions	Loveland, CO	45	1,500	42	41%	41%	13%	5%
2	Helena Agri-Enterprises	Collierville, TN	48	475	41	39%	42%	16%	3%
3	GROWMARK	Bloomington, IL	21	354	39	29%	44%	15%	12%
4	Simplot Growers Solutions	Boise, ID	32	237	41	38%	47%	12%	3%
5	CHS	Inver Grove Heights, MN	15	265	39	23%	58%	14%	5%
6	GreenPoint AG	Decatur, AL	10	77	8	26%	52%	21%	1%
7	Wilbur-Ellis	Denver, CO	19	151	40	50%	35%	11%	4%

COOPERATIVES: BLUE DEALERSHIPS: WHITE

GREATER THAN $1 BILLION

Percentage of total **CropLife 100** Revenues

FACT: This group was briefly a "Big Eight" during the 2024 **CropLife 100** listings but dropped back to seven members this year. Overall revenue for this group was off almost $1 billion from 2024, but the average sales per retailer figure grew by $400 million.



TOTAL GROUP SALES:
$29.5 Billion

SHARE OF TOTAL CROPLIFE 100 SALES:
69%

AVERAGE SALES PER RETAILER:
$4.2 Billion

Total = $42.9 Billion

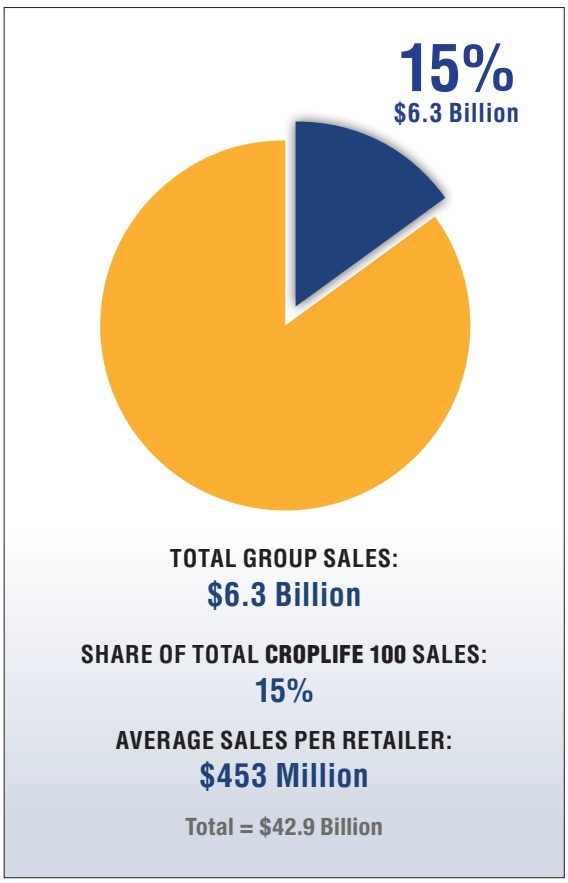
$201 Million to $1 Billion IN RETAIL SALES

Rank/Company		Headquarters Location	# States Served	# Retail Outlets	Years in CropLife 100	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales
8	Keystone Cooperatve	Indianapolis, IN	3	77	26	26%	56%	11%	7%
9	Agtegra Cooperative	Aberdeen, SD	2	60	35	19%	61%	14%	6%
10	NEW Cooperative	Fort Dodge, IA	2	89	16	23%	58%	13%	6%
11	Central Valley Ag Cooperative	York, NE	3	60	22	23%	63%	10%	4%
12	MFA	Columbia, MO	4	151	33	20%	60%	14%	6%
13	Valley Agronomics	Nampa, ID	6	40	14	31%	62%	4%	3%
14	Hefty Seed	Baltic, SD	10	49	24	65%	4%	31%	—
15	Effingham Equity	Effingham, IL	2	25	36	28%	51%	12%	9%
16	Ag Partners Coop	Goodhue, MN	2	30	4	22%	54%	14%	10%
17	United Cooperative	Beaver Dam, WI	1	17	17	22%	58%	17%	3%
18	The McGregor Co.	Colfax, WA	3	36	42	47%	47%	4%	2%
19	Sunrise Cooperative	Fremont, OH	1	26	9	26%	53%	13%	8%
20	Southern States Cooperative	Richmond, VA	8	75	35	20%	59%	16%	5%
21	Buttonwillow Warehouse	Bakersfield, CA	1	10	22	45%	54%	1%	—

COOPERATIVES: BLUE DEALERSHIPS: WHITE

$201 MILLION TO $1 BILLION
Percentage of total **CropLife 100** Revenues

FACT: This block of **CropLife 100** ag retailers gained back Keystone Cooperative from the More than $1 Billion club. If No. 19 Sunrise Cooperative merges with two other Ohio-based ag retailers in 2026, the rank order for this group could change radically.



$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
22	Landus Cooperative	Des Moines, IA	4	52	9	28%	63%	4%	5%
23	BRANDT	Springfield, IL	2	18	42	32%	42%	19%	7%
24	United Prairie	Tolono, IL	1	14	14	30%	52%	10%	8%
25	Mid Valley Agricultural Services	Oakdale, CA	1	7	37	47%	51%	2%	—
26	Twin State	Davenport, IA	2	14	39	28%	61%	5%	6%
27	Frontier Cooperative	Lincoln, NE	1	60	22	22%	58%	14%	8%
28	Premier Companies	Seymour, IN	4	12	7	26%	53%	14%	5%
29	Mid Kansas Cooperative	Moundridge, KS	2	60	17	23%	58%	11%	8%
30	Aurora Cooperative	Aurora, NE	5	53	34	87%	12%	—	1%
31	Heartland Co-op	West Des Moines, IA	3	78	29	17%	68%	8%	7%
32	Central Farm Service	Truman, MN	2	32	24	24%	60%	9%	7%
33	Frenchman Valley Farmers Coop	Imperial, NE	4	6	34	28%	62%	5%	5%
34	Fertizona	Casa Grande, AZ	2	10	37	30%	61%	9%	—

COOPERATIVES: BLUE DEALERSHIPS: WHITE

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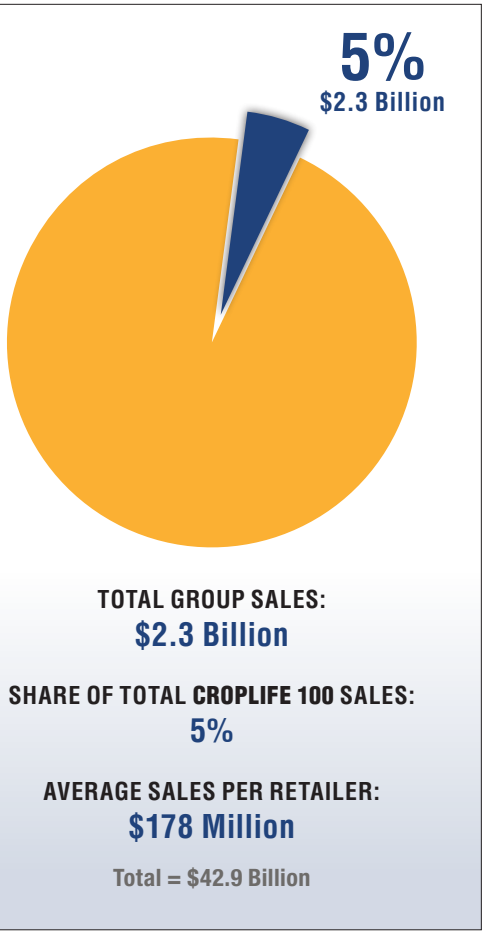
$151 MILLION TO $200 MILLION
Percentage of total **CropLife 100** Revenues

FACT: This group of ag retailers saw its overall revenues improve by more than $500 million during the 2025 growing season. Still, the average sales per ag retailer did fall slightly, from $180 million in 2024 to $178 million this year.



$101 Million to $150 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
35	Titan Pro	Clear Lake, IA	8	139	8	95%	2%	3%	—
36	G.S. Long	Union Gap, WA	2	4	34	76%	23%	1%	—
37	Alcivia Cooperative	Cottage Grove, WI	1	21	24	18%	64%	12%	6%
38	Country Visions Coop	Brillion, WI	1	25	11	15%	61%	17%	7%
39	The Andersons	Maumee, OH	3	10	29	23%	65%	4%	8%
40	River Valley Cooperative	Elkridge, IA	2	36	12	28%	51%	12%	9%
41	Diamond R. Fertilizer	Fort Pierce, FL	1	6	40	41%	56%	3%	—
42	Star of the West Milling	Frankenmuth, MI	6	32	32	19%	55%	17%	9%
43	Cooperative Farmers Elevator	Rock Valley, IA	3	25	10	31%	42%	19%	8%
44	Kova Fertilizer	Greensberg, IN	1	12	42	28%	63%	3%	6%
45	Asmus Farm Supply	Rake, IA	2	5	23	81%	10%	8%	1%
46	Heritage Cooperative	Delaware, OH	1	16	10	21%	56%	15%	8%
47	Novus Ag	Fort Collins, CO	4	15	10	32%	48%	12%	8%
48	Superior Ag	Huntingburg, IN	1	22	4	30%	51%	13%	6%
49	CPI	Hastings, NE	1	25	16	21%	71%	4%	4%
50	AgState	Cherokee, IA	1	35	19	37%	36%	21%	6%
51	Crystal Valley Cooperative	Mankato, MN	1	15	6	23%	53%	14%	10%
52	Carolina Eastern-Vail	Salem, NY	7	8	36	17%	69%	6%	8%
53	GAR	Reedley, CA	1	1	29	55%	45%	—	—
54	Country Partners Cooperative	Gothenburg, NE	1	20	2	21%	71%	4%	4%

COOPERATIVES: BLUE DEALERSHIPS: WHITE

$101 MILLION TO $150 MILLION
Percentage of total **CropLife 100** Revenues

FACT: This group remained relatively flat in overall revenues and market share compared with 2024. Given how many companies in the group just below this one missed in 2025, this block of ag retailers could add up to three new members in the 2026 **CropLife 100** rankings.

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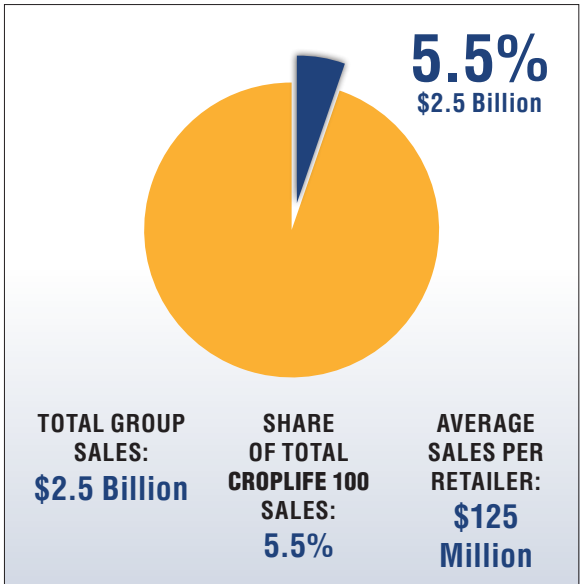


TOTAL GROUP SALES: $2.5 Billion

SHARE OF TOTAL CROPLIFE 100 SALES: 5.5%

AVERAGE SALES PER RETAILER: $125 Million

Total = $42.9 Billion

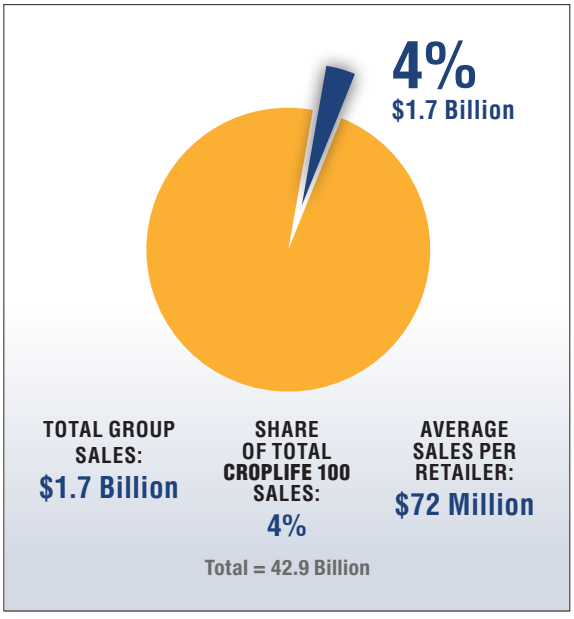
$51 Million to $100 Million IN RETAIL SALES

Rank/Company		Headquarters Location	# States Served	# Retail Outlets	Years in CropLife 100	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales
55	AgriPartners	Clear Lake, SD	3	5	8	38%	16%	44%	2%
56	Land View Fertilizer	Rupert, ID	3	9	32	33%	62%	4%	1%
57	The Dune Companies	Yuma, AZ	2	3	38	37%	59%	—	4%
58	Valley United Co-op	Reynolds, ND	2	9	18	35%	44%	17%	4%
59	Butte County Rice Growers	Richvale, CA	1	3	32	54%	45%	1%	—
60	The DeLong Co.	Clinton, WI	8	34	42	17%	52%	23%	8%
61	Willard Agri-Service	Frederick, MD	3	5	42	12%	81%	—	7%
62	Cooperative Elevator Co.	Pigeon, MI	2	13	35	26%	50%	19%	5%
63	Howard Fertilizer & Chemical	Orlando, FL	2	7	7	17%	83%	—	__
64	Marion Ag Services	St. Paul, OR	1	1	8	10%	78%	4%	8%
65	AgRx	Oxnard, CA	1	5	29	40%	54%	—	6%
66	Ricketts Farm Service	Salisbury, MO	1	7	6	34%	47%	11%	8%
67	Farm Service Co-op	Harlan, IA	1	8	28	26%	53%	11%	10%
68	Five Star Cooperative	New Hampton, IA	1	18	2	27%	54%	13%	6%
69	Nexus Cooperative	Charles City, IA	2	30	1	20%	63%	10%	
70	Mountain View Co-op	Black Eagle, MT	1	26	22	36%	56%	4%	4%
71	Pratum Co-op	Salem, OR	1	4	7	42%	51%	2%	5%
72	American Plains Coop	Great Bend, KS	2	23	22	36%	48%	10%	6%
73	LMG Ag Products	Visalla, CA	1	1	2	88%	12%	—	—
74	Pearl City Elevator	Lena, IL	2	8	14	23%	62%	8%	7%
75	Mercer Landmark	Celina, OH	1	6	3	27%	57%	10%	6%
76	Short Lane Ag Supply	Colby, WI	1	4	12	57%	25%	15%	3%
77	Eldon C. Stutsman	Hills, IA	1	4	41	19%	74%	2%	5%
78	Sims Fertilizer & Chemical	Osborne, KS	1	1	31	94%	2%	1%	3%

COOPERATIVES: BLUE DEALERSHIPS: WHITE

$51 MILLION TO $100 MILLION
Percentage of total **CropLife 100** Revenues

FACT: The largest block of ag retailers within the **CropLife 100**, this group saw a big jump in overall revenues during 2025, from $1.3 billion to more than $1.7 billion. One of the **CropLife 100**'s newest members – Nexus Cooperative – ranks in this group at No. 69.



$25 Million to $50 Million IN RETAIL SALES

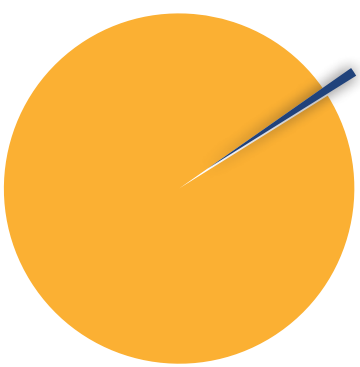
Rank	Company	Headquarters Location	# States Served	# Retail Outlets	Years in CropLife 100	% Crop Protection Sales	% Fertilizer Sales	% Seed Sales	% Custom App Sales
79	Griffin Fertilizer	Frostproof, FL	1	3	42	30%	70%	—	—
80	Farm Service Inc.	Walnut Ridge, AR	1	7	33	25%	56%	11%	8%
81	Delta Growers	Charleston, MO	1	4	33	19%	63%	14%	4%
82	Top Ag Coop	Okawville, IL	1	11	5	32%	45%	15%	8%
83	Legacy Cooperative	Scottsbluff, NE	1	12	29	39%	45%	11%	5%
84	B and D Chemical	Cullom, IL	1	1	6	84%	14%	—	2%
85	El Dorado Ag Products	Elkhart, TX	1	6	40	1%	97%	1%	1%
86	Farmer's 1st Ag	East Prairie, MO	1	3	1	35%	32%	31%	3%
87	TH Agri-Chemicals	Plainfield, WI	1	1	36	93%	6%	—	1%
88	Rockwood Ag Services	Brawley, CA	2	3	4	61%	36%	2%	1%
89	Valley Ag Supply	Gayville, SD	1	2	10	31%	51%	9%	9%
90	Midwestern BioAg	Blue Mounds, WI	6	7	9	—	94%	3%	3%
91	Smith Fertilizer & Grain	Knoxville, IA	1	8	11	11%	38%	8%	43%

COOPERATIVES: BLUE DEALERSHIPS: WHITE

88

$25 MILLION TO $50 MILLION
Percentage of total **CropLife 100** Revenues

FACT: This group saw a significant drop in revenues from 2024, falling from $603 million to $412 million. The average sales per retailer also was off, down $4 million from 2024. Still, the 1% market share this group represented of all **CropLife 100** ag retailers stayed the same.



1%
$412 Million

TOTAL GROUP SALES:
$412 Million

SHARE OF TOTAL CROPLIFE 100 SALES:
1%

AVERAGE SALES PER RETAILER:
$32 Million

Total = $42.9 Billion

Less than $25 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
92	Jay-Mar	Plover, WI	1	1	40	8%	84%	7%	1%
93	Burnt Prairie Fertilizer	Burnt Prairie, IL	1	1	5	33%	34%	25%	6%
94	O'Toole Companies	Letts, IA	1	3	3	36%	44%	9%	11%
95	Baltz Feed	Pocahontas, AR	2	3	20	29%	57%	9%	5%
96	Valley Farmers Supply	Worden, MT	1	4	6	37%	53%	6%	4%
97	New Ag Services	Hortonville, WI	1	2	4	18%	63%	12%	7%
98	The Mill	White Hall, MD	1	3	7	18%	68%	8%	6%
99	BEI Hawaii	Honolulu, HI	1	6	20	5%	95%	—	—
100	Warner Fertilizer	Somerset, KY	1	11	41	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 2025, however, up more than $1 million per company to $20 million. And 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.

TOTAL GROUP SALES:	SHARE OF TOTAL CROPLIFE 100 SALES:	AVERAGE SALES PER RETAILER:
$179 Million	0.5%	$20 Million

Total = $43.3 Billion

The 'Big 8' Categories

TOP 10 Fertilizer

Total Sales/Top 10: $14 billion
Share of Total *CropLife 100* Fertilizer Sales: 71%

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

TOP 10 Crop Protection Products

Total Sales/Top 10: $11.7 billion
Share of Total *CropLife 100* Crop Protection Product Sales: 77%

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

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	Hefty Seed
8	Wilbur-Ellis
9	Agtegra
10	Keystone Cooperative

TOP 10 Custom Application

Total Sales/Top 10: $1.3 billion
Share of Total *CropLife 100* Custom Application Sales: 75%

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

TOP 10 Smart Tech Services/Products

Total Sales/Top 10: $274 million
Share of Total *CropLife 100* Precision Ag Sales: 79%

1	GROWMARK
2	Nutrien Ag Solutions
3	Helena Agri-Enterprises
4	CHS
5	Simplot
6	Valley Agronomics
7	Sunrise Cooperative
8	Effingham Equity
9	Keystone Cooperative
10	NEW Cooperative

TOP 10 Grain

Total Sales/Top 10: $17.9 billion
Share of Total *CropLife 100* Grain Sales: 69%

1	CHS
2	GROWMARK
3	Central Valley Ag
4	Agtegra
5	The DeLong Co.
6	NEW Cooperative
7	Heartland Co-op
8	CPI
9	River Valley Cooperative
10	MFA

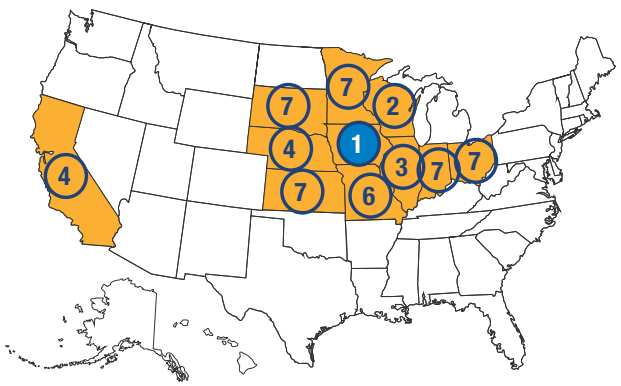
TOP 10 Top 11 Locations

Top Locations/Top 11: 3,515
Share of Total *CropLife 100* Locations: 70%

1	Nutrien Ag Solutions	1,500
2	Helena Agri-Enterprises	475
3	GROWMARK	354
4	CHS	265
5	Simplot	237
6	Wilbur-Ellis	151
7	MFA	151
8	Titan Pro	139
9	NEW Cooperative	89
10	Greenpoint Ag	77
10	Keystone Cooperative	77

TOP 11 States by Company Headquarters

1	Iowa	15	7	Indiana	4
2	Wisconsin	9	7	Minnesota	4
3	Illinois	8	7	Kansas	4
4	California	7	7	Ohio	4
4	Nebraska	7	7	South Dakota	4
6	Missouri	5			



CropLife SMART TECH

CropLife 100

TRACKING THE SMART TECH AGE

In 2025, the nation's top ag retailers did see hints that newer ag technologies are gaining market ground.

BY ERIC SFILIGOJ
EDITOR

IN TERMS OF MARKET BUZZ, NEWER AG TECHNOGOLIES (i.e., Smart Tech) have been the talk for much of the agricultural world these past few months. Indeed, since the first practical artificial intelligence (AI) systems were introduced to the world a few years ago, these technologies have exploded across numerous industry landscapes — including agriculture.

"Drones, vision spraying, and short stature corn — all these things will fundamentally change the way farming is done going forward," said Paul Bonnett, Senior Director, Nutrien Agronomy, at one industry event during early 2025. "In my mind, I believe these will have as profound an impact on this industry as the introduction of genetically-modified crops did back in the mid-1990s."

That's why when *CropLife® Magazine* compiled the information from its 2024 **CropLife 100** survey of the nation's top ag retailers, the Smart Tech numbers were surprising. During 2024, ag retailers saw their revenues in Smart Tech systems and services decline 59%, from $815 million in 2023 to $338.1 million. Many respondents to the 2024 survey blamed the overall decline in grower-customers income between 2023 and 2024 for this drop. On a more positive note, many **CropLife 100** ag retailers predicted that 2025 would be a better year for Smart Tech sales as market conditions "settled back down."

A Stronger 2025

Luckily, these predictions proved to be accurate. According to data collected in the 2025 **CropLife 100** survey, Smart Tech products and services sales did rebound, hitting $347.8 million. This represented an almost 3% revenue increase from 2024.

In terms of what advantages Smart Tech products and services offer to ag retailers and their grower-customers, the majority of respondents (58%) believed these systems were the most useful in helping to make better informed decisions when it came to farming practices and in-field operations. The rest of the survey respondents were split equally — 16% apiece — in thinking Smart Tech products and services were the most useful in addressing ongoing labor issues (such as maintaining an adequate workforce on the farm) or in helping grower-customers maximize their crop inputs prices/usage.

Besides looking at how Smart Tech systems are currently helping ag retailers and their grower-customers in today's agricultural market, **CropLife** wanted to find out more about what Smart Tech systems the nation's top ag retailers are planning to invest revenues in going into the 2026 growing season. For this question, respondents could choose multiple options — and many did just that!

Perhaps not surprisingly, far and away the most popular Smart Tech options among ag retailers for next year were software and apps. These products were chosen by 33% of respondents as their Smart Tech picks for 2026.

A close second was any kind of Smart Tech systems to help equip self-propelled sprayers for custom application work. According to the 2025 **CropLife 100** survey, 24% of respondents plan to purchase these kinds of Smart Tech products for their 2026 growing season needs.

Rounding out the Top Three, 18% of respondents plan to invest in AI systems for 2026. This would include products for in-field work as well as office/facility management.

As far the rest of the options, 14% of 2025 **CropLife 100** ag retailers are looking to purchase Smart Tech imagery/satellite systems in 2026. Seven percent plan to invest in soil sampling Smart Tech equipment.

Surprisingly, autonomous vehicles finished last among Smart Tech options for the nation's top ag retailers. Only 4% of 2025 **CropLife 100** survey respondents plan to buy these products next year.

Better Decision-Making

Most ag retailers believe Smart Tech helps customers make better decisions.

What role do you think Smart Tech Plays with Customers?

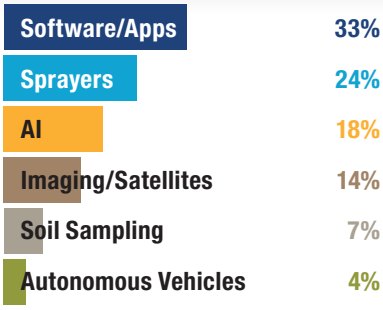
Base = 77 | Source: 2025 **CropLife 100** Survey

Software/Apps Lead the Pack

In Smart Tech, software and apps will be the major purchases in 2026.

Photo: MangKangMangMee / stock.adobe.com

What Smart Tech Products Do You Plan to Invest in Next Year?



Base = 77 | Source: 2025 **CropLife 100** Survey

Fertilizer Recovers, But . . .

Fertilizer revenues were steady during 2025, but there were signs of trouble for some sectors.

BY ERIC SFILIGOJ
EDITOR

CONSIDERING HOW MUCH "NEGATIVE" MARKET BUZZ there was during the 2025 growing season, the fertilizer category performed remarkably well. Still, there were hints that trouble could be just around the corner.

According to data collected in the 2025 **CropLife 100** survey, the fertilizer category saw its overall revenues remain relatively flat for the year. Sales for 2025 came in at $19.9 billion – the identical sales figure that the category recorded during the 2024 growing season. Furthermore, the category was able to hold onto its overall market share among the nation's top ag retailers vs. all the other crop inputs/services categories at 46%.

Despite these numbers, many **CropLife 100** ag retailers told *CropLife® Magazine* that convincing their grower-customers to apply certain macronutrients was a much more difficult task than it has been in recent growing seasons.

In particular, respondents said, phosphorus application was a really tough sell in 2025. According to the 2025 **CropLife 100** survey data, 30% of the nation's top ag retailers described convincing their grower-customers to apply phosphorus as "very challenging." This represented a big jump in percentages compared with the 2024 **CropLife 100** survey, where only 16% of respondents said phosphorus sales were "very challenging."

In addition, 35% of 2025 **CropLife 100** ag retailers described convincing their grower-customers to apply phosphorus as "more challenging than normal." The remaining 35% of respondents said phosphorus sales for them were "not usually challenging" compared with prior growing seasons.

Even the most popular macronutrient in terms of usage – nitrogen – wasn't immune to this application resistance from grower-customers. In the 2024 **CropLife 100** survey, 12% of respondents said convincing their grower-customers to apply nitrogen-based fertilizer was "very challenging." In 2025, this percentage increased to 16%. Another 45% of the nation's top ag retailers said getting their grower-customers to apply nitrogen to their fields was "more challenging than normal" – up from 35% in the 2024 **CropLife 100** survey data. Only 39% of **CropLife 100** ag retailers described their efforts to get customers to apply nitrogen fertilizers as "not usually challenging."

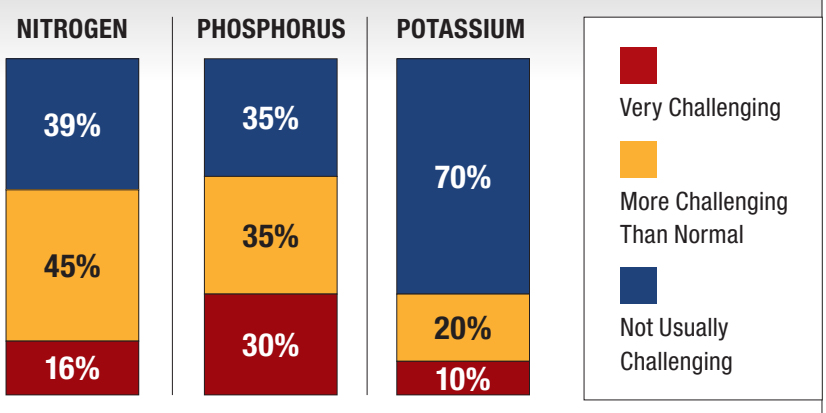
The only macronutrient that continued to meet with "universal approval for application among grower-customers" in 2025 was potassium/potash. According to the 2025 **CropLife 100**

Photo: iamporpla / stock.adobe.com

Phosphorus Remains a Harder Sell

Among the macronutrients, **CropLife 100** ag retailers said phosphorus was more challenging to sell in 2025.

How would you rate selling fertilizer products in 2025?



Base = 96 | Source: 2025 **CropLife 100** Survey

survey, 70% of respondents said convincing their grower-customers to purchase potassium was "not usually challenging." Twenty percent said potassium sales in 2025 were "more challenging than normal." The remaining 10% found making potassium sales to their grower-customers "more challenging than normal" for the 2025 growing season.

More Corn Expected

With the 2025 fertilizer numbers in the books for **CropLife 100** ag retailers, the question now turns to how will the 2026 growing season play out? According to many market watchers, the lack of export sales on the soybean front for 2025 could push many growers to decide to plant more corn acres during the 2026 growing season. And by their nature, corn plants are much more dependent upon crop nutrition products than their soybean counterparts.

But do **CropLife 100** ag retailers think this will happen? The data suggests a different scenario might play out instead.

In terms of acreage numbers for next year, a slight majority – 37% – of **CropLife 100** ag retailers expect corn acreage for 2026 to increase between 1% and more than 10% for their grower-customers. Another 33% of respondents believe corn acreage in 2026 will be identical to what it was in 2025 (just over 97 million acres). The remaining 30% believe corn acreage next year will drop between 1% and more than 10%.

For soybeans, the outlook for 2026 is even brighter. Despite the trade issues in 2025, 48% of 2025 **CropLife 100** ag retailers predict soybean acreage among their grower-customers will increase between 1% and more than 10%. Thirty-one percent predict flat acreage for soybeans in 2025 (just over 83 million acres). The remaining 21% believe soybean acreage in their areas will fall between 1% and more than 10%.

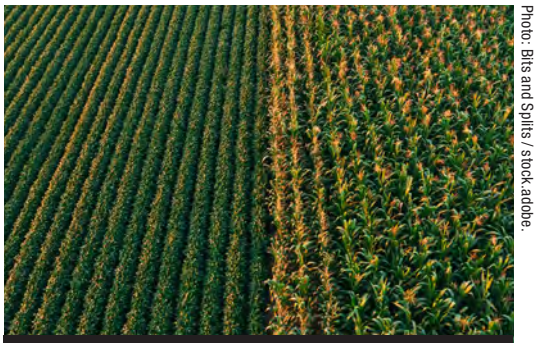


Photo: Bits and Splits / stock.adobe.

Some Increases for Corn/Soybeans

Most **CropLife 100** ag retailers think corn and soybean acres will grow in 2026.

What are your estimates for the acreage mix in 2026?

CROP	UP	FLAT	DOWN
Corn	37%	33%	30%
Soybeans	48%	31%	21%

Base = 95 | Source: 2025 **CropLife 100** Survey

Holding Its Own

The crop protection products category was relatively flat in 2025 but did see some progress in a few segments.

Photo: Valerii / stock.adobe.com

BY ERIC SFILIGOJ
EDITOR

GIVEN HOW THE OVERALL MARKETPLACE PERFORMED FOR the nation's top ag retailers this past year, the crop protection products category can be very pleased with its performance. According to the 2025 **CropLife 100** survey, crop protection product revenues for this past growing season were virtually identical to their sales in 2024 – $15.3 billion. Market share for the category also held steady at 36%.

Similar to 2024, the growth in the crop protection products category in 2025 came from the insecticides segment. Last year, 45% of the nation's top ag retailers recorded sales gains between 1% and more than 5% in this segment among their grower-customers. According to the 2025 **CropLife 100** survey respondents, this percentage jumped up to 52% during this year's growing season.

Another 23% experienced flat insecticide segment sales during 2025. The remaining 25% saw revenue decline in this segment, with sales down between 1% and more than 5% vs. 2024.

Still, in terms of overall growth among crop protection products, biologicals continue to lead the pack – as the segment did during the 2024 growing season. Last year, the biologicals segment was up between 1% and more than 5% for 62% of the nation's top ag retailers. This was better than 12% higher than any other crop protection products segment for that year.

In 2025, the rate of growth for the biologicals segment did drop off a bit, to 56% of ag retailers seeing growth between 1% and more than 5%. But this was still the highest percentage of positive growth among the four crop protection products segments.

As for the rest of the **CropLife 100** ag retailers in 2025, 29% of respondents experienced flat sales for biologicals. The rest, 15%, recorded sales declines between 1% and more than 5% for this segment.

Slower Growth for Herbicides, Fungicides

Perhaps not surprisingly, the largest crop protection products segment in terms of overall usage – herbicides – mirrored that of the entire category. According to the 2025 **CropLife 100** survey, 44% of respondents saw their sales in this segment grow between 1% and more than 5% this year. This was identical to the percentage the segment saw among the nation's top ag retailers during the 2024 growing season.

The other percentages for herbicides were slightly different, but not by much. According to the survey, 16% of respondents had flat herbicide sales during 2025 (vs. 15% in 2024). The remaining 40% recorded sales declines in herbicides between 1% and more than 5% (compared with 41% in 2024).

Performing the worst among the crop protection products segments in 2025 was fungicides. In 2024, 45% of the nation's top retailers saw growth of between 1% and more than 5% in this segment. This year, that percentage dropped to 42%.

Instead, 58% of **CropLife 100** ag retailers recorded flat or declines in fungicide sales. This split almost evenly – 30% of respondents had flat sales in fungicides during the 2025 growing season; 28% saw sales declines of between 1% and more than 5%.

A Basically Flat Market

The majority of ag retailers saw no big changes in their crop protection products sales in 2025.

SEGMENT	UP	FLAT	DOWN
Herbicides	44%	16%	40%
Fungicides	42%	30%	28%
Insecticides	52%	23%	25%
Biologicals	56%	29%	15%

Base = 97 | Source: 2025 **CropLife 100** Survey

Photo: Tyler Olson / stock.adobe.com

No Changes in Sprayer Fleets for 2025

The Big Three in self-propelled sprayers saw their market shares hold steady, but there were some changes in service perception.

BY ERIC SFILIGOJ
EDITOR

IN THE WORLD OF TELEVISION, nobody likes repeats. However, in the equipment world, repeats of strong years are always welcome, especially when overall market economic conditions seem less than stellar.

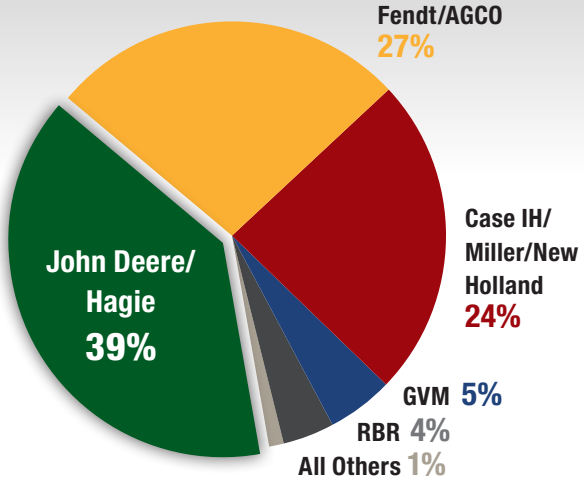
According to data collected from the 2025 **CropLife 100** survey of the nation's top ag retailers, the color mix in their self-propelled sprayers fleets remained remarkably consistent throughout the whole of the 2025 growing season. The Big Three equipment manufacturers – John Deere/Hagie, Fendt/AGCO, and Case IH/Miller/New Holland – continued their overall dominance among ag retailers, holding a combined 90% market share. Coincidentally, this was the same percentage these three industry giants held according to the data collected in the 2024 **CropLife 100** survey.

Given these facts, it should come as no surprise that the individual market shares held by the Big Three among self-propelled sprayer fleets at the nation's ag retailers remained static as well. According to the 2025 **CropLife 100** survey, John Deere/Hagie had the largest share at 39%, followed by Fendt/AGCO at 27%, and Case IH/Miller/New Holland at 24%.

The Big Three Maintain Dominance

Combined, the largest self-propelled sprayer manufacturers control 90% of the total market among **CropLife 100** retailers.

Which company products do you currently have in your fleets?

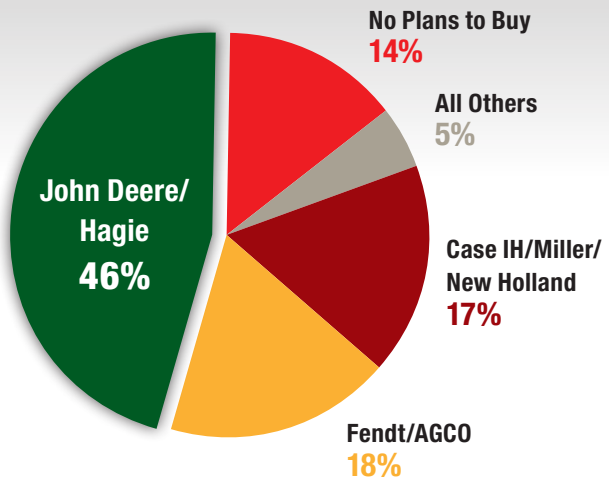


Base = 86 | Source: 2025 **CropLife 100** Survey

A Green Future

The majority of **CropLife 100** ag retailers plan to buy John Deere/Hagie sprayers in 2026.

Which company products do you plan to purchase in 2026?



Base = 86 | Source: 2025 **CropLife 100** Survey

This was identical to the market shares each of these companies held according to information from the 2024 **CropLife 100** survey.

Furthermore, the remaining 10% of the market not controlled by the Big Three saw no appreciable moment either. According to the 2025 **CropLife 100** survey, GVM and RBR Enterprise held 9% of this market share combined (split 5% to 4%, respectively). Again, this was identical to the market shares these companies had recorded among ag retailers during the 2024 growing season.

Still Buying Big Three

For market observers, the future of the self-propelled sprayers market going forward looks as if it won't be markedly different in shape as it appears today. Overall, according to the 2025 **CropLife 100** survey, 81% of the nation's top ag retailers plan to continue buying their self-propelled sprayers for the 2026 growing season from the Big Three manufacturers.

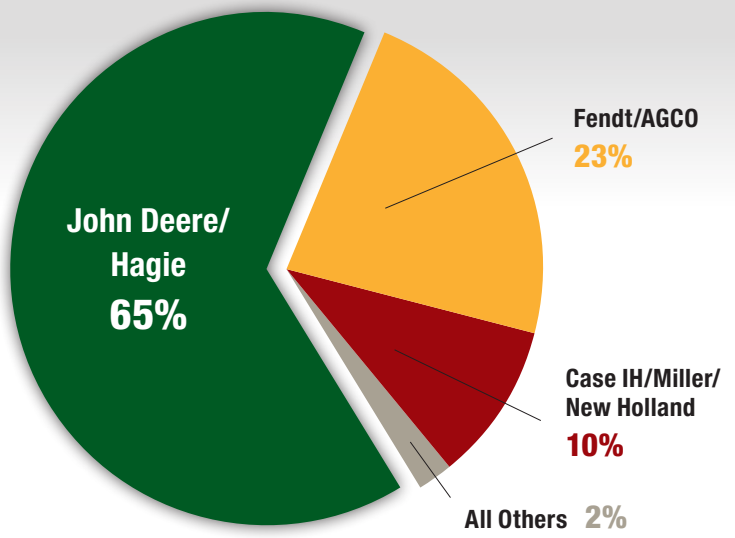
Broken down according to the survey data, 46% plan to buy John Deere or Hagie sprayers next year, up slightly from 42% in the 2024 **CropLife 100** survey. Purchases of Fendt/AGCO and Case IH/Miller/New Holland sprayers will be down slightly from 2024, with 18% of **CropLife 100** ag retailers planning to buy Fendt/AGCO machines (vs. 19% in 2025) and 17% planning to purchase Case IH/Miller/New Holland units (compared with 18% in 2025). Another 5% plan to make their self-propelled sprayer purchases from some of the smaller companies in the marketplace, including GVM, RBR, and Horsch. The remaining 14% of the nation's ag retailers have no plans to upgrade their self-propelled sprayer fleets for the 2026 growing season.

If there was one difference in the information collected in the 2025 **CropLife 100** survey vs. the 2024 **CropLife 100** survey when it came to equipment manufacturers, it was in the area of service. For several years now, the annual survey has asked the nation's top ag retailers to rate which company they believe provides the best overall service to its customers.

Fendt/AGCO Gains in Service

According to **CropLife 100** ag retailers, John Deere/Hagie remains the best service provider, but Fendt/AGCO gained some ground in 2025.

Which company provides the best service?



Base = 86 | Source: 2025 **CropLife 100** Survey

Each and every year, John Deere/Hagie has led the pack in this area, The company did so again in the 2024 survey, rated the best in service by 72% of respondents. Fendt/AGCO and Case IH/Miller/New Holland finished second and third, with 16% and 12%, respectively.

But according to the 2025 **CropLife 100** survey, Fendt/AGCO has made a big move up in the service department among the nation's top ag retailers. The Duluth, GA-based manufacturer of Rogators is now perceived as providing the best service to its customers by 23% of **CropLife 100** ag retailers, an improvement of 7% vs. 2024.

Still, John Deere/Hagie leads among all self-propelled sprayer manufacturers when it comes to service according to 65% of **CropLife 100** ag retailers. However, this is a decline of 7% from the 2024 survey data.

The remaining 12% of 2025 **CropLife 100** respondents split their answers on the service question among Case IH/Miller/New Holland (10%, down 2% from the 2024 data) and "all others" at 2%.

Photo: dasuwan / stock.adobe.com

Seed Sales Drop

The seed category saw a slight revenue decline during 2025 but managed to hang onto its overall market share.

BY ERIC SFILIGOJ
EDITOR

IN AN OVERALL FLAT MARKETPLACE, A SALES DECLINE HAS TO BE CONSIDERED a loss. For the seed category, 2025 was not the best of years, according to the numbers.

Based upon the data collected from the nation's top ag retailers in the annual **CropLife 100** survey, seed sales for 2025 dropped back slightly from their 2024 numbers – down $100 million, from $5.8 billion in 2024 to $5.7 billion. If there's some good news to be had from this revenue drop, it's that it wasn't severe enough for the seed category to lose any market share compared with other crop inputs/services tracked in the **CropLife 100** report. This held steady at 13%.

According to market watchers, the seed category has not experienced many of the supply chain disruptions and extreme market price swings that have plagued other crop input categories such as crop protection products and fertilizer these past few growing seasons. It also probably hasn't hurt the category that some of the geopolitical forces affecting global supply/demand don't seem to apply to seed.

Furthermore, overall, ag retailers say their seed revenues over the past decade have remained fairly consistent. According to data from the 2025 **CropLife 100** survey, 29% of the nation's top ag retailers that sell seed say their sales have grown "somewhat" since 2015. Another 26% indicated that the seed category revenues for their operations have grown "steadily" during this time span. Twenty-nine percent indicated that their overall seed sales have been flat in the last decade or so. The remaining 16% of respondents said that their seed category sales had dropped during this time.

What Motivates Seed Purchases?

In terms of what motivates seed purchases from **CropLife 100** ag retailers, the 2025 survey results indicate that there is one factor that drives the majority of sales. According to the 2025 **CropLife 100** survey, 58% 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.

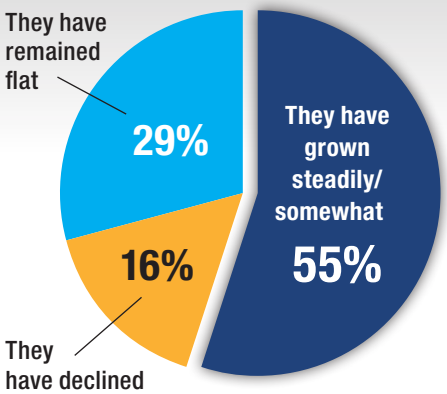
After variety type, a distant second reason for grower-customers to buy the seeds they do ties back to location conditions – specifically soil type. This was cited by 21% of **CropLife 100** ag retailers for why their seed customers buy the seeds they do.

As for the remaining 21% of respondents, they indicated that their seed customers buy products based upon such factors as weather (3%) and "it's the seed type they have always bought, so our company keeps that one in stock" (18%).

Steady Seed

A majority of ag retailers say that their seed sales have improved annually for many years now.

Over the past 10 years, how would you characterize your seed sales?



Base = 62 | Source: 2025 **CropLife 100** Survey