PRECISION AGRICULTURE

Intelligence Report

2025

The 2025 Precision Agriculture Intelligence Report offers an in-depth examination of the sector's competitive landscape and growth drivers. It provides a detailed analysis of key industry aspects, including funding trends, merger and acquisition (M&A) activity, patent intelligence, the partnership ecosystem, and global expansion strategies.

$668M Funding raised (Precision Ag)	**37** Funding rounds tracked	**3,987** Precision ag granted (Filed In 2024)	**250+** Market events analysed

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SECTION 1

Executive Summary

This report draws on data tracked and verified by iGrow Intelligence across the calendar year 2025. Patent data is sourced separately from Google Patents Public Data. All other data — funding rounds, M&A transactions, partnerships, product launches, appointments, and expansion events — comes from the iGrow News database of over 200 verified precision agriculture articles published in 2025, cross-referenced against company announcements and press releases.

The report focuses primarily on 2025 data, with historical comparisons to 2022–2024 where meaningful trends can be identified. Where multi-year patent data is presented, the full available dataset (2015–2025) is used to provide context.

$668M	14	70	61
Funding raised (37 rounds)	M&A deals(peak year)	Product launches (2025 only)	Partnerships tracked

Key 2025 Trends at a Glance

The following ten observations reflect the most significant patterns in the iGrow News 2025 dataset and the patent intelligence gathered for this report. They are presented as findings, not forecasts.

1. **Autonomous weeding robots attracted the majority of 2025 precision ag funding.** Funding was led by Ecorobotix ($105M Series D), Carbon Robotics ($20M), TRIC Robotics ($5.5M), and Bonsai Robotics ($15M). The focus is chemical-free, autonomous field-level weed management with proven unit economics.

2. **John Deere made two significant acquisitions within three months.** Deere continued its multi-year strategy of integrating the full precision farming stack by acquiring Sentera (aerial imagery and AI agronomics) in May 2025 and GUSS Automation (autonomous sprayers) in August 2025. CNH Industrial acquired Advanced Farm's IP and assets in April.

3. **China filed 78% of all tracked precision ag patents in 2025, but was granted only 1.4%.** This reflects a deliberate national IP strategy, driven by state policy, university incentives, and urgent domestic priorities like agricultural labour substitution and water scarcity.

4. **AMAZONE (Amazonen-Werke) remains one of the most active European precision ag innovators.**
   In 2025, AMAZONE launched new products (BladeCut 1800, Venterra VR 4 hoe, Cirrus 8004-2C Grand drill, AI EasyMatch system), opened a US facility in El Dorado, Kansas, and expanded its Academy training center.

5. **Big Tech entered precision ag data infrastructure in 2025.**
   Arable partnered with Google (May) and Amazon (August) for cloud and data infrastructure. CNH Industrial integrated Starlink (SpaceX) connectivity into farm equipment. These partnerships signal that hyperscalers view precision ag sensor data as a strategically valuable vertical.

6. **Agritechnica 2025 concentrated 19 product launches into a single month.**
   November saw the highest monthly product launches, largely due to the world's largest agricultural machinery trade show, with five new products each from Case IH and New Holland, plus major announcements from CLAAS, Pessl Instruments, FieldBee, and others.

7. **Patent filing cessation may function as a leading indicator of company distress.**
   Analysis of the 2019–2022 boom cohort found that companies such as Franka Emika GmbH stopped filing patents approximately 12 months before bankruptcy. Climate Corp ceased filing in the same year it was restructured by Bayer. This pattern warrants attention as a possible early warning signal, though it requires verification across a larger sample.

8. **North America is the dominant target for international precision ag expansion.**
   Ecorobotix (Switzerland), Solinftec (Brazil), Javelot (France), and Topcon Positioning Systems all announced North American expansions in 2025. The combination of large farm sizes, high technology adoption rates, and deep distribution infrastructure continues to make the US the primary international scale-up market.

9. **Brazil is emerging as an outward-looking precision ag market.**
   Two Brazilian companies expanded internationally in 2025, targeting Latin American and North American markets respectively. This signals a shift: Brazil is beginning to export precision ag innovation, not just adopt it.

10. **South Korea is quietly building one of the most diversified precision ag IP portfolios.**
    With a 22.8% patent grant rate, filings across 7 of 8 tracked sub-segments, and strong performance in Farm Management Software (40% grant rate) and AI/ML (22.2%), Korea's startup ecosystem is building notable IP breadth that receives less attention than China's volume or Germany's quality.

ROI Highlights for Different Audiences

This intelligence is designed to reduce decision risk across several distinct use cases:

- **Venture Capital & Growth Investors:** Maps which sub-segments are attracting capital (autonomous weeding robots, AI crop intelligence), which are stalling (satellite sensing, farm management software), and which companies are building defensible IP portfolios. The patent mortality analysis provides a potential leading indicator of company health ahead of formal announcements.
- **Corporate Strategy & M&A Teams:** Documents every acquisition completed in 2025, with strategic rationale and buyer profiles. Identifies companies still independently filing patents in 2024–2025 — the remaining acquisition universe for equipment OEMs and food companies.
- **Equipment Manufacturers & OEMs:** Maps which technology companies are becoming platform-agnostic integration partners and which are building proprietary stacks that may compete with OEM software. The product launch calendar shows where competitors are concentrating R&D resources.
- **Startups & Founders:** Identifies partnership patterns, funding stage preferences by technology type, and geographic expansion playbooks from comparable companies. The M&A section documents the most likely acquirer profiles by technology domain.
- **Government & Policy Bodies:** Quantifies the scale of China's IP accumulation in precision ag and identifies specific technology sub-classes where Western countries have zero competing patents — evidence for R&D funding and IP policy prioritisation.

SECTION 2

Methodology & Data Sources

This report combines two distinct intelligence streams. Understanding their different natures is important for interpreting findings correctly.

Stream 1: iGrow News Market Intelligence

The iGrow News editorial team tracks companies, deals, and events across the precision agriculture sector through continuous monitoring of company announcements, press releases, regulatory filings, and verified media reports. For this report, 213 articles were tagged to the Precision Agriculture sector and published in calendar year 2025.

Each article is categorised by type (Funding Round, M&A, Partnership, Product Unveil, Appointments, Expansion, etc.), sector, country, and relevant structured fields (funding amount, deal participants, partnership type, position titles, etc.). Only confirmed, published events are included — no estimates, projections, or unverified reports.

Stream 2: Patent Intelligence (Google Patents Public Data)

Patent data is sourced from the patents-public-data.patents dataset available via Google BigQuery. A custom table was built to filter, classify, and analyse precision agriculture patents using CPC (Cooperative Patent Classification) codes.

The dataset covers patents with filing dates between January 1 and September 30, 2025. Patents filed in Q4 2025 are underrepresented due to the publication lag — patents typically take 6–18 months from filing to public publication. For historical analysis, data from 2010 onwards is used.

Definitions

- **Precision Agriculture:** Technologies and services that use data, sensors, automation, and AI to optimize agricultural inputs and outputs at the field or sub-field level. Includes autonomous field robots, variable rate application, crop sensors, farm management software, precision irrigation, drone sensing, and AI crop analytics. Excludes general agribusiness, food processing, livestock, regenerative ag and commodity trading.
- **Funding Round:** Equity financing only — Series A/B/C/D, Seed, Bridge, and Government Investment. Grants, debt financing, venture fund launches, and undisclosed investments are included in funding totals where disclosed in public announcements.
- **Patent Grant rate:** The percentage of published patents that have been formally awarded (status = active) at the time of data extraction (as of 31st March 2026). The remainder are classified as pending, regardless of filing date.

- **Startup (patent analysis):** Companies with 5–500 total precision ag patents, first filing in 2015 or later, with at least 3 patents filed after 2019. Known large incumbents and universities are excluded.
- **Publication lag:** The delay between patent filing and public publication, typically 6–18 months. This causes an apparent decline in recent filings that does not reflect actual filing activity.

Scope note: *This report defines precision agriculture narrowly, focusing on field-level, outdoor crop technologies. Regenerative agriculture, livestock tech, and controlled environment agriculture (CEA) — such as vertical farming and greenhouse automation — are outside the scope of this analysis, as these sectors are tracked separately.*

Data Boundaries

This report uses two distinct data streams: iGrow News market intelligence and Google Patents Public Data. Readers must understand the boundaries of each.

- **Patent Grant Rates:** Calculated as of March 31, 2026, these are point-in-time figures. Since examination cycles take 18-36 months, the 3.8% grant rate for 2024 filings will rise materially as decisions are made through 2027/2028. Country- and company-level rates are current snapshots, not final.
- **Q4 2025 Patent Filings Underrepresented:** The dataset covers January 1 to September 30, 2025. Q4 2025 filings are largely absent due to the 6–18 month publication lag. All 2025 annualized patent estimates extrapolate January–September actuals and should be treated as lower bounds.
- **Funding Totals:** The $668M total across 37 rounds includes only publicly announced and verifiable equity financing. Undisclosed rounds and non-equity financing (debt, grants, venture fund launches) are excluded. Total capital deployed is therefore likely higher, potentially significantly, due to undisclosed early-stage rounds.
- **M&A Transaction Values:** The majority of the 15 M&A transactions tracked in 2025 did not disclose financial terms. Strategic significance assessments are based on technology, buyer profile, and competitive positioning—not deal value. Deal order does not imply relative importance.
- **Market Intelligence Coverage Bias:** The 213 articles reflect events iGrow News identified, verified, and published in 2025. This is not a complete global census. Activity is undercounted in non-English-language markets, particularly China, Japan, South Korea, India, and Brazil, and in markets outside iGrow News's primary focus. North American and Western European events are most comprehensively tracked due to abundant English-language press. Readers should apply this coverage bias when assessing relative market maturity.