

CNH FARMER PULSE

THE AGTECH ADOPTION EDITION

Understanding how North American farmers are adopting precision technology today
— and where they see the greatest opportunity for tomorrow.

CNH Farmer Pulse is a recurring snapshot of how farmers across North America are feeling about the forces shaping modern agriculture. Through proprietary research and insights from farmers in the field, each edition provides a real-time look at evolving priorities, challenges, and opportunities across the industry. By capturing farmer sentiment on the topics that matter most, CNH Farmer Pulse serves as an industry barometer, helping customers, dealers, policymakers, media, and the broader agriculture community better understand how farming is changing.

The inaugural edition focuses on AgTech adoption, exploring how farmers are using precision technology today, where they see measurable value, and what will influence future investment.

Executive Summary

The findings paint an optimistic – but practical – picture of precision agriculture. Based on a survey of 217 farmers and ranchers across the United States and Canada, precision technology has become an established part of many farming operations, particularly foundational technologies such as guidance systems. Farmers overwhelmingly recognize the ability of precision tools to improve efficiency, reduce input costs, optimize labor resources, and increase yields. **More than half also expect to continue investing in precision technology over the next two years.**

At the same time, farmers are clear about what they need next. They want technology that is easier to use, delivers reliable data, and is able to demonstrate a strong return on investment. Cost, complexity, connectivity, and confidence in long-term value remain the biggest hurdles to broader adoption. Overall, the research suggests farmers believe precision technology works — they simply want solutions that deliver clear economic value and fit seamlessly into their daily operations.



“/”

The next chapter of precision agriculture will be defined by making technology easier to use, easier to trust, and easier to prove its value. Farmers are telling us they believe in precision agriculture. Our responsibility is to continue delivering solutions that save time, reduce costs, improve productivity, and fit naturally into the way they work every day.”

– **Eric Shuman**, Head of Precision Technology Product Management, CNH

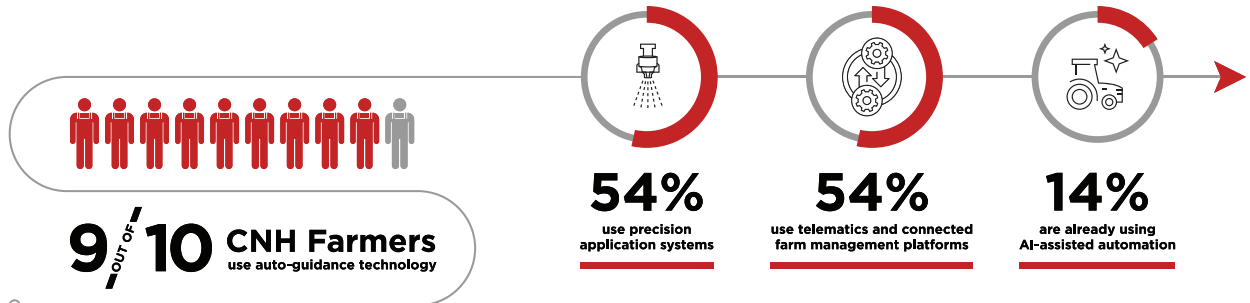


Key Findings

1

Precision technology has become mainstream in farming.

Precision technology has moved well beyond early adoption and is now part of everyday farming for many operations.



- Nearly 9 in 10 CNH farmers (89%) use auto-guidance technology (e.g., GPS guidance, auto-steering, and mapping).
- 54% use precision application systems (e.g., technology that automatically adjusts fertilizer or spraying applications).
- 54% use telematics and connected farm management platforms (e.g., systems that collect, track, and share equipment and field data).
- 14% are already using AI-assisted automation (e.g., systems that use sensory input to automatically adjust equipment based on field conditions with little to no operator input), signaling growing interest in the next generation of agricultural technology.

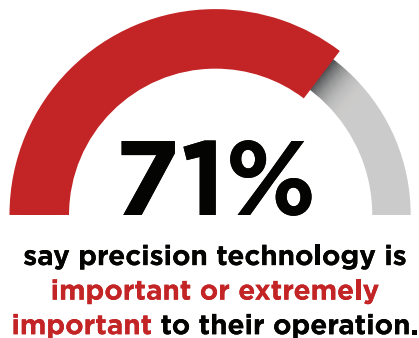
As newer technologies mature, farmers are building on a strong foundation of precision tools already integrated into daily work.

2

Farmers see precision technology as essential to modern agriculture.

Precision technology is viewed as an important contributor to farm success.

- 71% say precision technology is important or extremely important to their operation.
- Among technology-forward farmers, this rating climbs to 95%.



The findings suggest that precision technology is increasingly viewed as a competitive advantage rather than an optional investment.

3

Farmers are seeing measurable value from their investments.

Most respondents believe precision technology is delivering meaningful results.

- 62% rate their precision technology as moderately or extremely valuable.
- That increases to 70% among cash crop producers.
- Among the most advanced technology users, it reaches 82%.

Overall, farmers report meaningful value from precision technology, with the highest value ratings among advanced users.

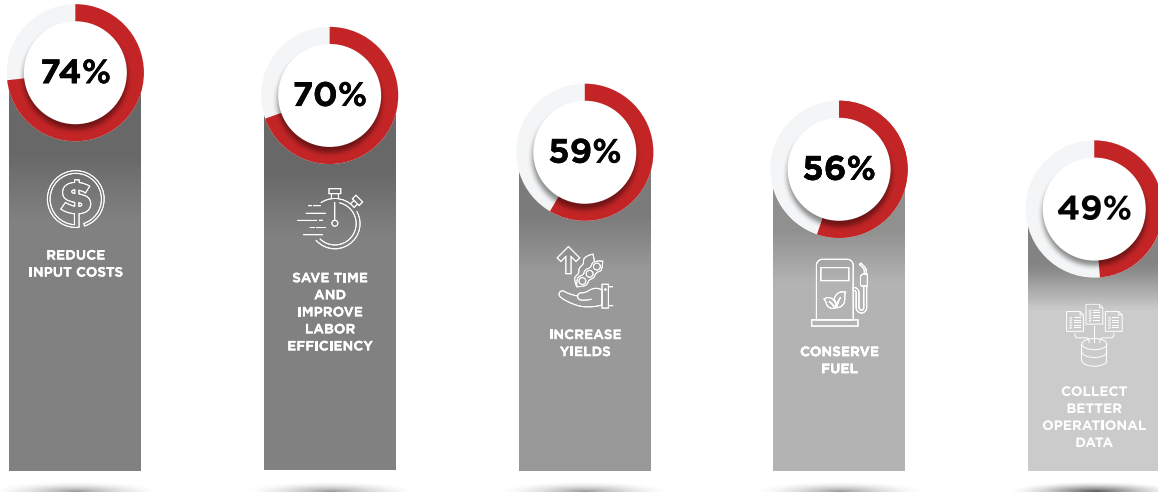
Key Findings

4

Practical business outcomes are driving adoption.

Farmers are investing in technology because it improves business performance.

According to CNH farmers, top reasons for using or considering precision technology include:

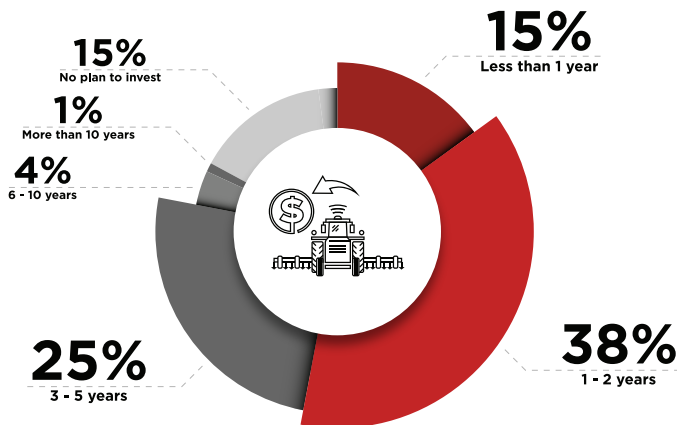


These findings reinforce that adoption is driven by measurable operational benefits that improve productivity and profitability.

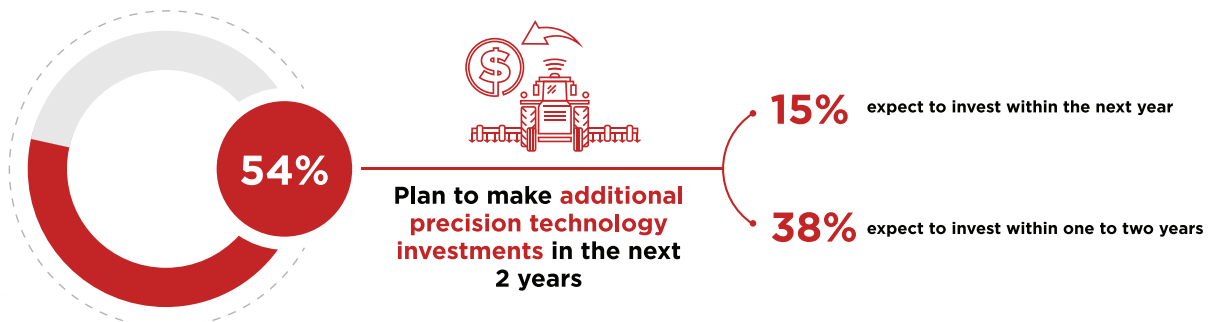
5

Investment momentum remains strong.

Farmers continue to see opportunity in expanding their use of precision technology.



Together, more than half (54%) anticipate making additional precision technology investments over the next two years, highlighting continued confidence in the long-term value of these tools.



Key Findings

6

Farmers want technology built into new equipment.

When farmers invest next, many prefer integrated technology rather than aftermarket additions.

- Among the 85% of respondents considering a future precision technology investment, 43% expect their next investment to come through purchasing new equipment embedded with the latest precision capabilities.

The findings point to growing demand for factory-integrated systems that simplify setup, improve reliability of operational data gathered, and deliver a seamless user experience.

7

Simplicity and ROI will define the next wave of adoption.

Farmers remain enthusiastic about precision technology, but adoption will depend on delivering greater ease of use and stronger economic outcomes.

The leading barriers to broader adoption include:

- 56% cite cost as the biggest obstacle.
- 36% remain uncertain whether additional technology will deliver sufficient value.
- 21% say more training is needed.
- Connectivity and ease of use continue to influence adoption decisions.

The opportunity for the industry is clear: make precision technology simpler, easier to support, and capable of demonstrating meaningful, measurable returns.

What Farmers Are Saying “/”

“The degree to which farmers are utilizing technology is separating the best from the otherwise good operations.”

“Ever since we switched to precision technology, it's been amazing how input costs have decreased and yields have increased.”

“[Compared to our Dad, who retired in 2013,] my brothers and I have seen great value in technology. We are eager to add [more] tech, learn to use it, and learn from it. ... Keep the technology/automation coming, the [next generation of farmers] will use it.”

“Five years ago, when we started using precision technology, especially on our air drills [seeding equipment], we saved so much on input costs and gained more yields and profits at the end of the year.”

“Precision technology is only beneficial to the farmer if it works as it should and pays for itself quickly. If the data we collect only creates a pretty map, it's worthless. Data needs to be accurate and provide an actionable tool to increase efficiency and/or yield.”

Methodology

The CNH Farmer Pulse: AgTech Adoption Edition surveyed 217 farmers and ranchers across the United States and Canada between May 14-31, 2026. Participants are members of the CNH Farmer Feedback research panel and are farm decision-makers or influencers who identify Case IH, New Holland, or another agriculture brand as their primary equipment brand. The survey included quantitative questions and open-ended responses collected through an online questionnaire.

The respondent base represents a broad cross-section of North American agriculture, with 82% of respondents from the United States and 18% from Canada. Farm sizes ranged from 50 acres to more than 5,000 acres, with nearly three-quarters operating between 500 and 5,000 acres. Annual farm revenue also reflected a diverse mix of operations, including 41% generating \$1 million or more in annual revenue, alongside small, mid-sized, and large family farms.