

# TMA Annual Conference

## Thriving in the Face of Disruption

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Agriculture Sector Specialist, Robert Bosch Australia

“If I had asked people what they wanted, they would have said faster horses...”

*~ Henry Ford*

DISRUPT or BE DISRUPTED?

# Thriving in the Face of Disruption

## AGENDA

- ▶ Who is Bosch?
- ▶ What's driving an AgTech Boom and Disruptive Technology?
- ▶ Start Up Activity
- ▶ Robotics and Automation
- ▶ Future Challenges and preparation



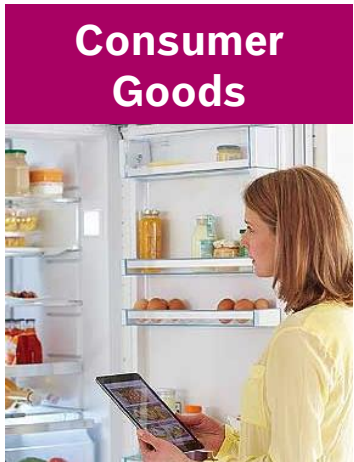






# BOSCH GROUP: TECHNOLOGY TO ENHANCE QUALITY OF LIFE

## FOUR BUSINESS SECTORS



**130 Years**  
making and selling “things”

**276**  
manufacturing sites

**Private**  
92% owned by a charitable trust

**\$104 Billion**  
in sales (AUD)

**390,000**  
associates incl. 59,000 in R&D



# BOSCH AND AGRICULTURE

## ALREADY A €1Bio pa BUSINESS



# rexroth

## A Bosch Company

### EHC-15 components – popular configuration





WORLD POPULATION WILL BE

**5 BILLION BY 2030**

FOOD PRODUCTION WILL NEED TO DOUBLE BY THEN

Only precision agriculture — powered by AgTech  
will get us there

# Drivers of an AgTech boom in Australia

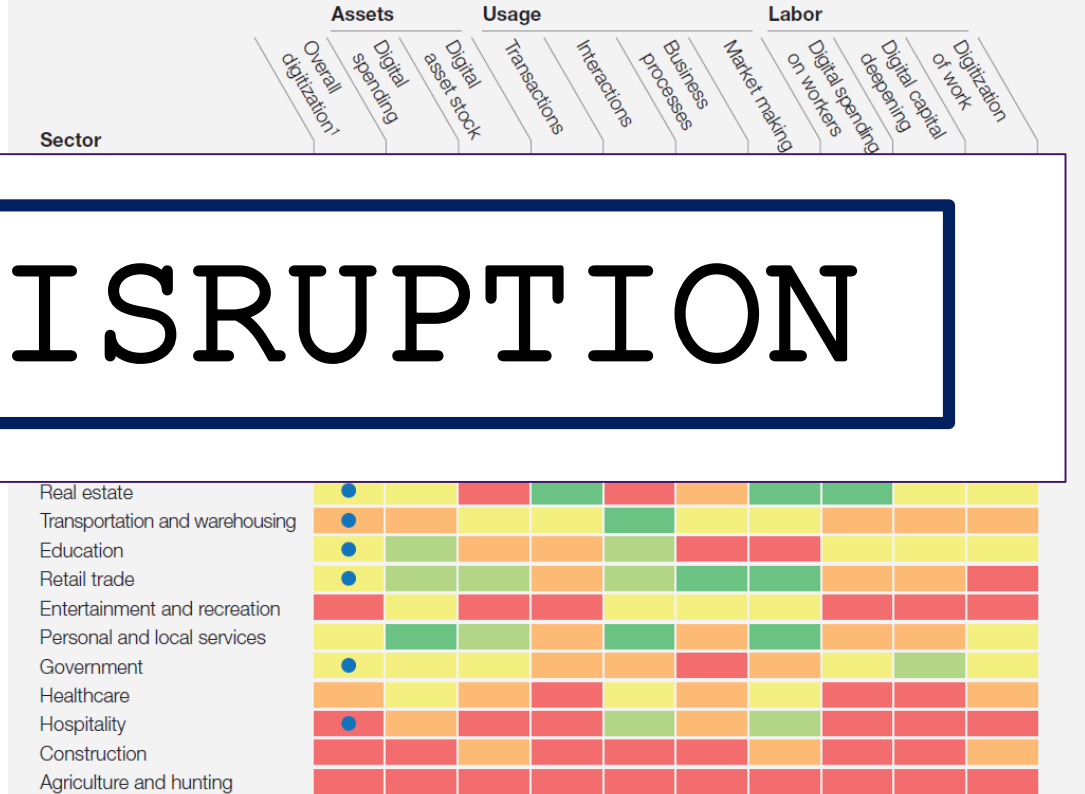
## ► World's least digitised industry

OPEN FOR DISRUPTION

- Australia's biggest natural advantage lies in agriculture
- Investment dollars flowing
- Highest labour cost in the OECD

McKinsey Global Institute industry digitization index;  
2015 or latest available data

Relatively low digitization  Relatively high digitization  
● Digital leaders within relatively undigitized sectors



<sup>1</sup>Based on a set of metrics to assess digitization of assets (8 metrics), usage (11 metrics), and labor (8 metrics).

<sup>2</sup>Information and communications technology.

Source: AppBrain; Bluewolf; Computer Economics; eMarketer; Gartner; IDC Research; LiveChat; US Bureau of Economic Analysis; US Bureau of Labor Statistics; US Census Bureau; McKinsey Global Institute analysis





UBER

World's largest  
taxi company

Owens NO

~~Taxis~~



World's largest  
Accommodation provider

Owens NO

~~Real  
estate~~



World's largest  
Phone companies

Owens NO

~~Telco  
infra~~



Alibaba Group

World's most  
Valuable retailer

Owens NO

~~Inventory~~

facebook.

Most popular  
Media owner

Owens NO

~~Content~~



World's fastest  
Growing bank

Owens NO

~~Actual  
money~~

NETFLIX

World's largest  
movie house

Owens NO

~~Cinemas~~



World's largest  
Software vendors

Owens NO

~~Apps~~





# AG TECH: 100+ TECHNOLOGY COMPANIES CHANGING THE FARM



CBINSIGHTS



# Start-Up Landscape

It's starting to get busy ... but beware of the hype!









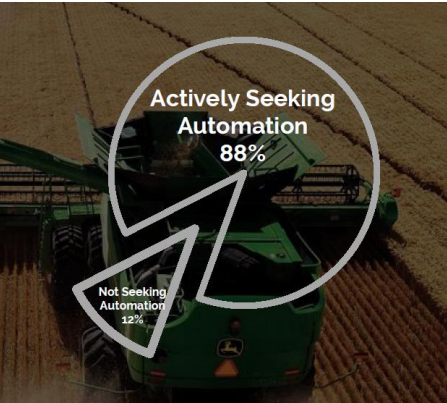
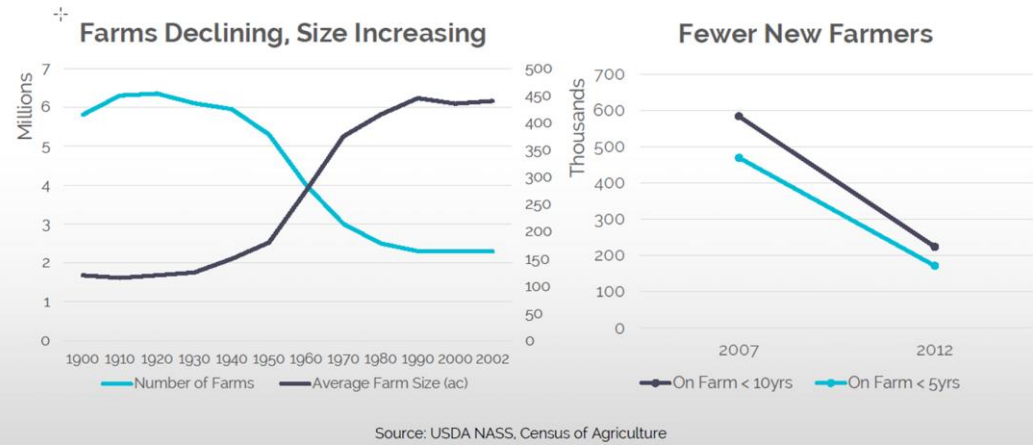
# DULL. DIRTY. DANGEROUS.



# Robotics & Automation

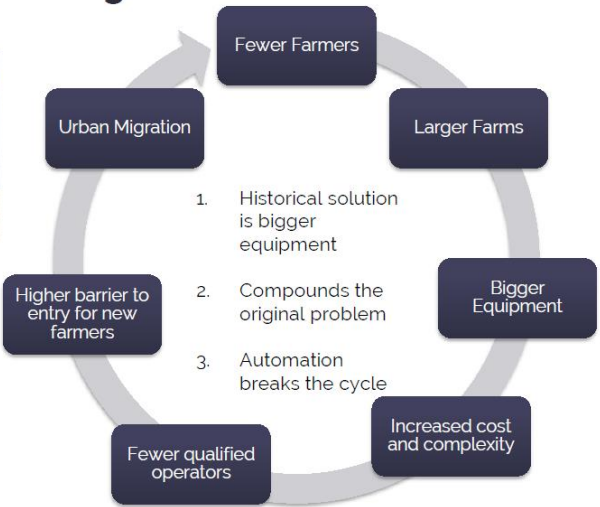
## ROBOTICS

### Larger farms, Fewer farmers, Increased demand for labor



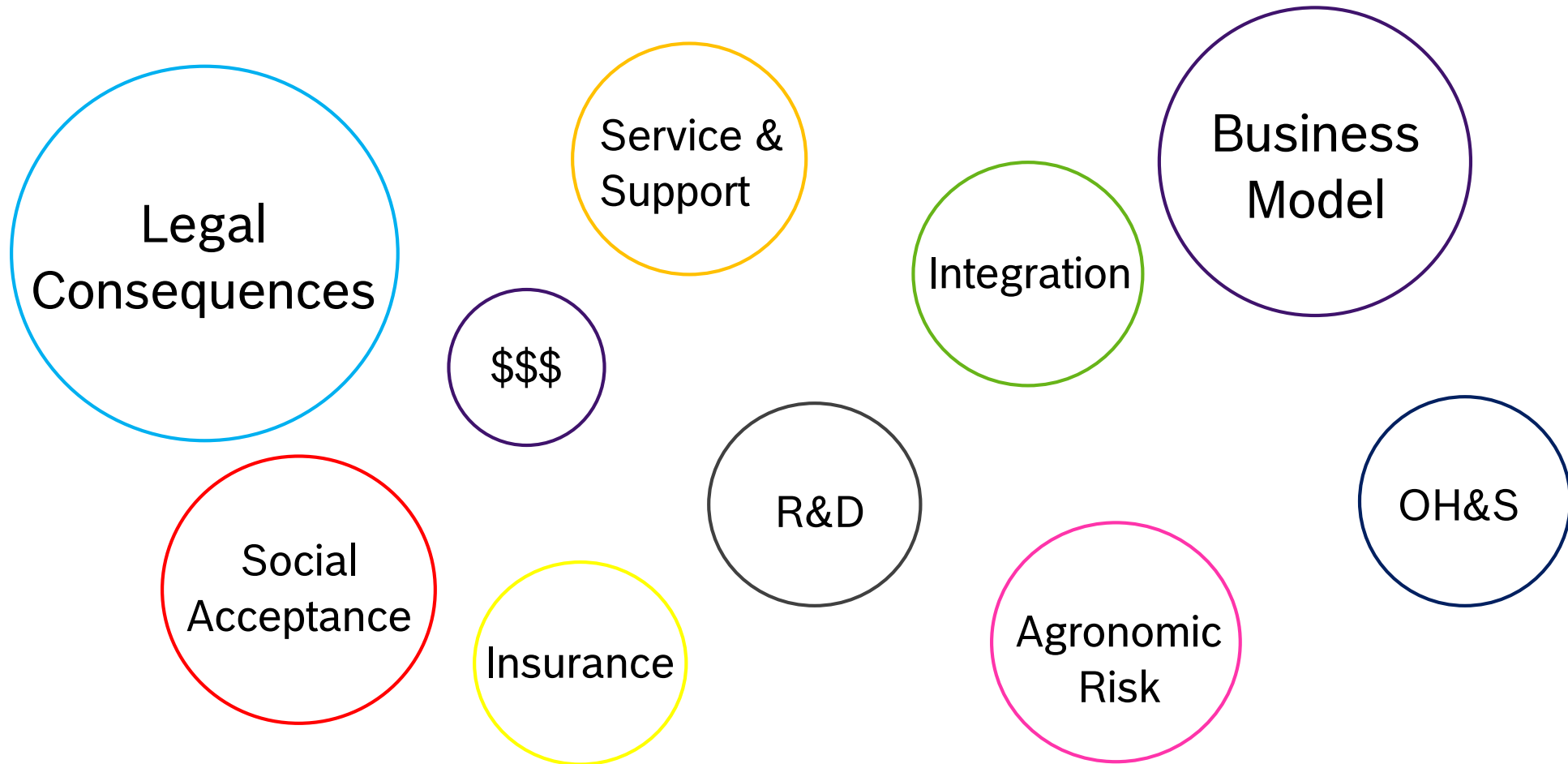
## What role will robotics play in the future?

### Historical solution reaching diminishing returns



# Thriving in the Face of Disruption

## Robotics & Automation – *Are we ready?*



# Thriving in the Face of Disruption

## Future Challenges and Preparation

► Disruption can be debilitating, but it can also be the gateway to unprecedented opportunity in your industry if you are open minded and prepared;

1. Don't face disruption alone
2. Make yourself indispensable
3. Embrace operational flexibility

In order to maintain your position in the face of emerging innovation you need to take an approach based on **strategic partnerships, platform business models** and **open collaboration**



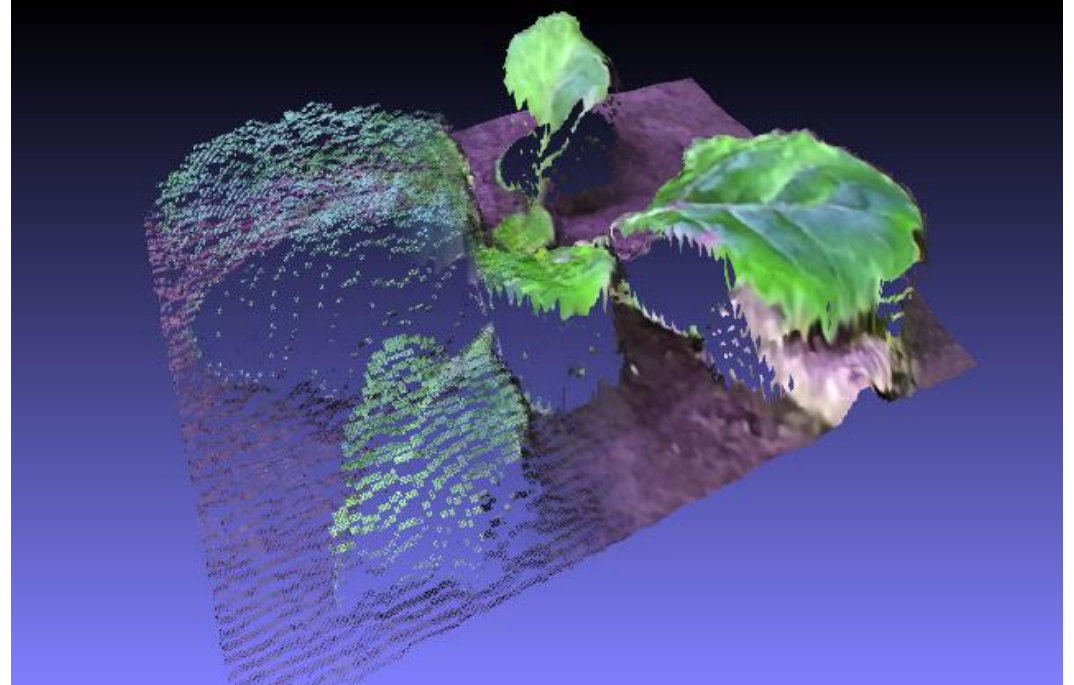


# Disruptive Technology

## Prepare – Engage – Participate

**You have a  
very exciting (read: unpredictable) future**





# THANK YOU