





*Bright farming is yours by choice*

*farming innovators*



# *The story of Lely*

- What drives us
- Who we are
- Our customers
- A history in innovations
- Worldwide partner



*What drives us*

*farming innovators*







**Agriculture**  
A dynamic sector  
with an essential  
role: to feed a  
growing  
population in a  
sustainable way.

## **Vision**

A sustainable,  
profitable and  
enjoyable future  
in farming.



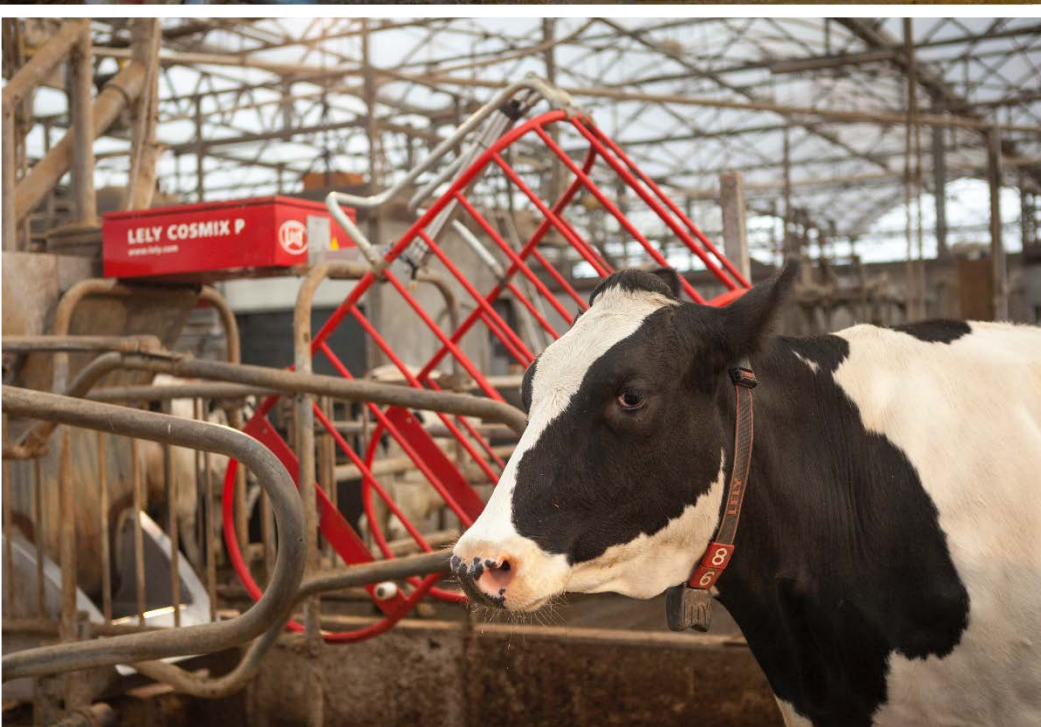


## Mission

We create innovative solutions that help our customers excel in sustainable milk production to feed the world.









**Barn  
philosophy:  
Free cow traffic**





*Who we are*

*farming innovators*



# **Lely**

A family run  
company with  
farming  
in its DNA



Cornelis van der  
Lely Founder



Arij van der Lely  
Founder



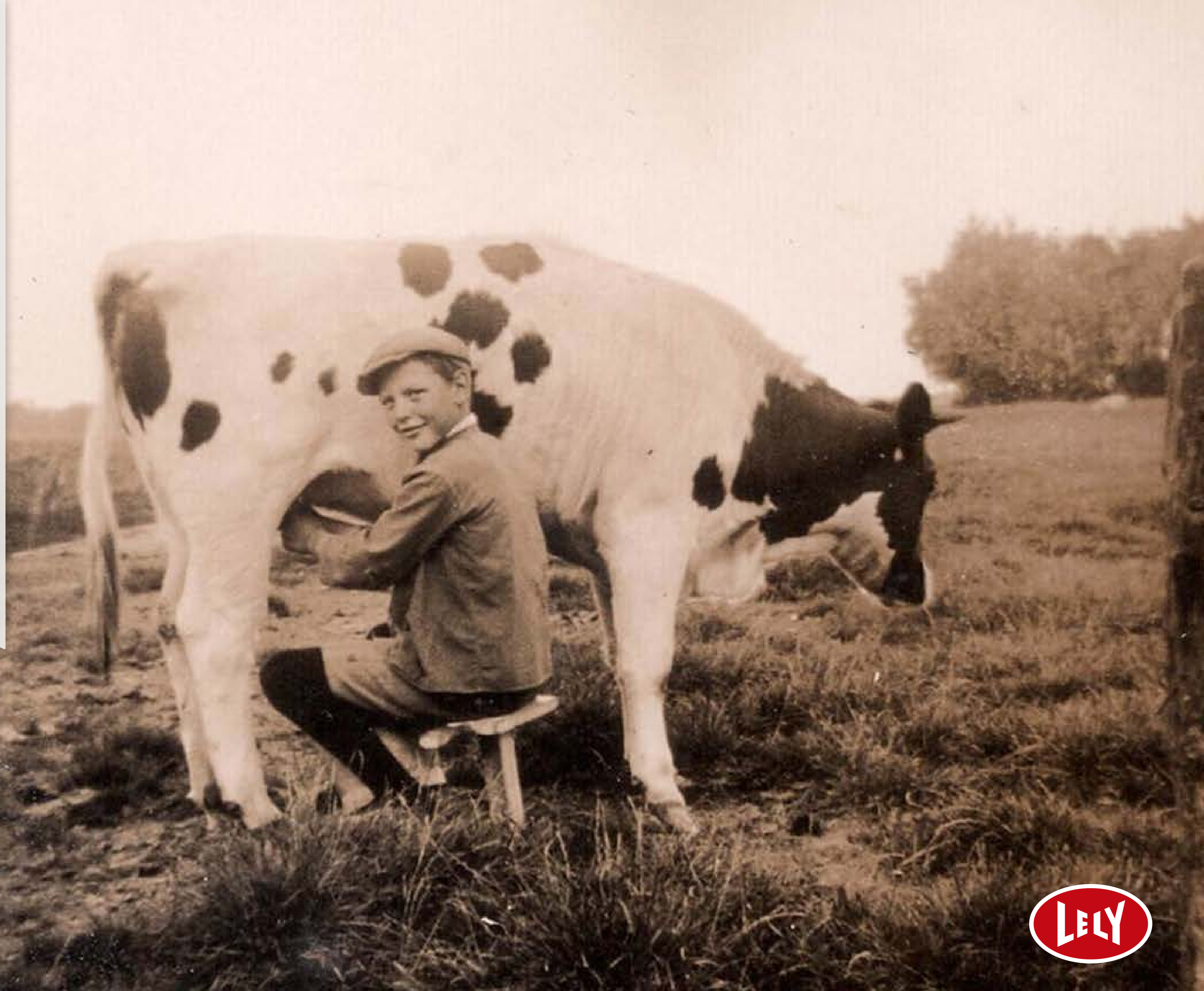
Alexander van der Lely  
CEO Lely





# Heritage

Founded with  
the aim to make  
the lives of farmers  
and their herd  
more enjoyable



**Lely**  
**today**

Annual Sales  
**€400 mln**

Number of  
employees  
**1.200+ fte**

Investments in  
R&D from our  
product turnover  
**6%**



Number of living  
patents  
**1.600**

Number of  
R&D units  
**4**

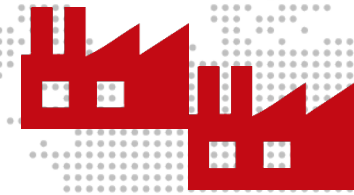
Number of  
production units  
**3**

Number of  
markets  
**> 40**



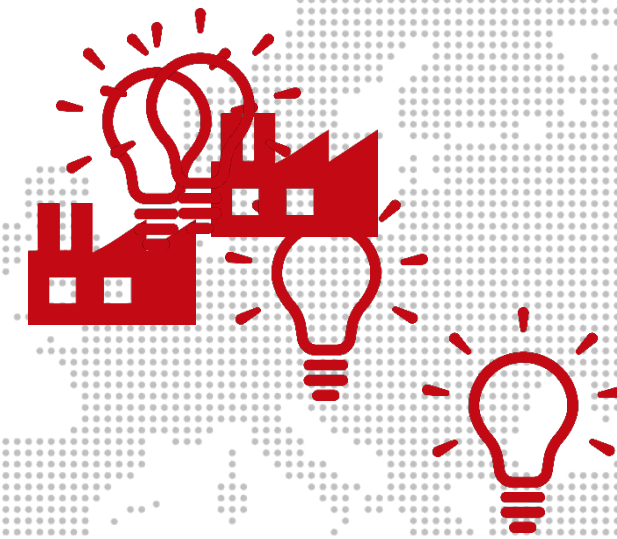


# Production sites



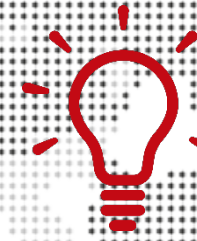
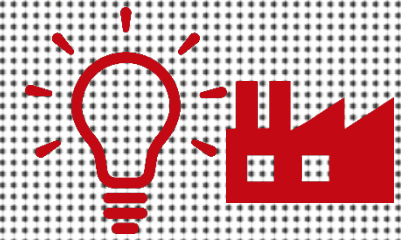


# R&D sites





**Customers in  
> 40 countries**



# *Our customers*

*farming innovators*





**We are passionate  
to offer our  
customers a bright  
future and help them  
to excel.**





# Challenges that drive our innovations





A wide-angle photograph of a large, modern dairy farm interior. The space is filled with rows of black and white cows in metal stalls. A central aisle with a metal grate floor runs through the middle. The high ceiling has a complex steel structure with skylights and hanging fans. The overall atmosphere is clean and industrial.

**Dairy XL:**  
The perfect  
partner for  
dairy farms with  
a herd of over  
500 cows





# Red Cow Community Partnerships for large dairy farms



# *A history in innovations*

*farming innovators*





**1948**  
Invention of  
the finger  
wheel rake





**1958**  
**Single disc**  
**spreader**





**1965**  
**The Lely Lotus**  
**tedder**



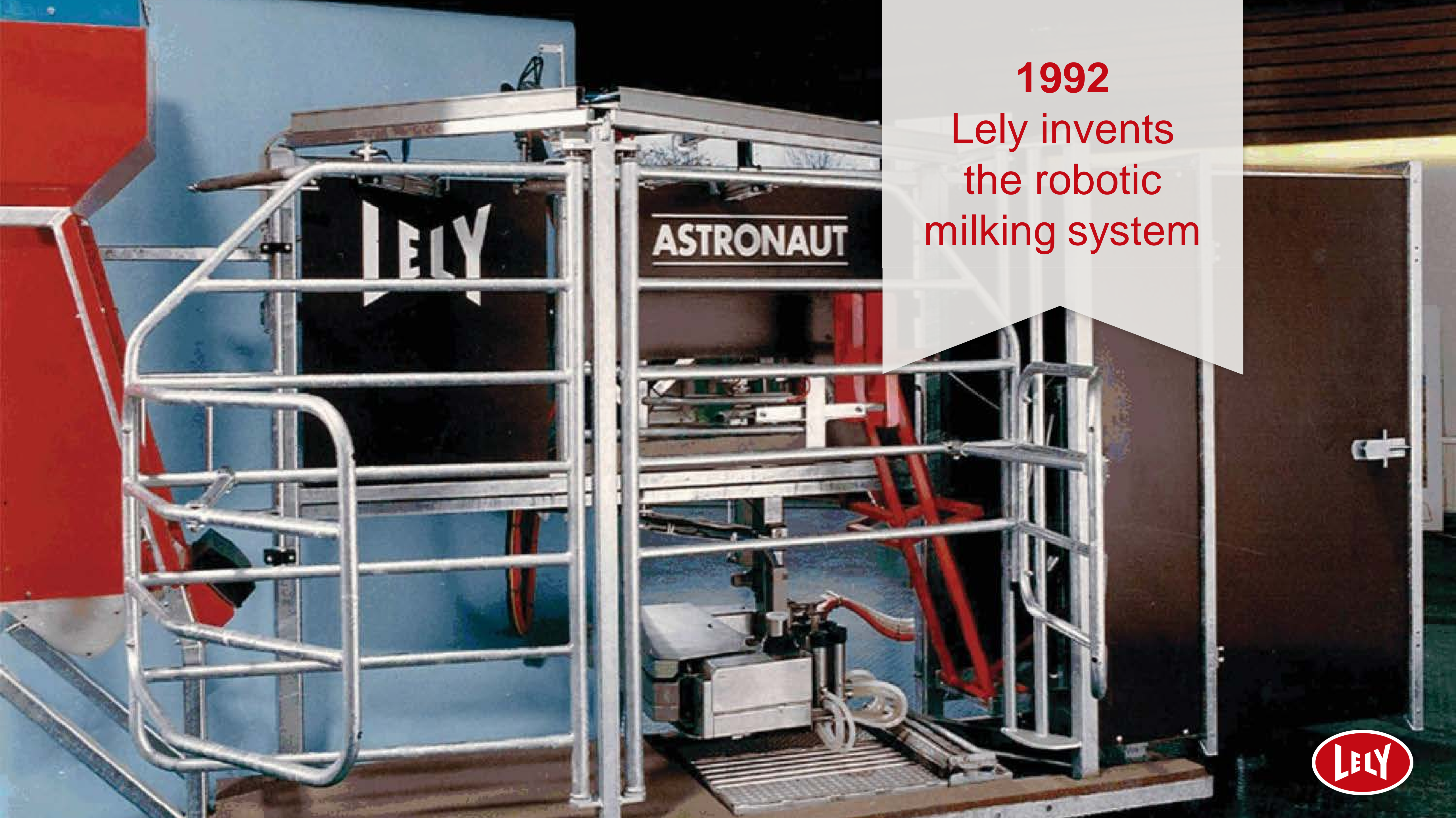


**1968**  
The Lely Terra  
power harrow





**1992**  
Lely invents  
the robotic  
milking system







**2017**  
A whole  
generation of  
robotic milkers





**Today**  
More than  
30 000 robots in  
the field





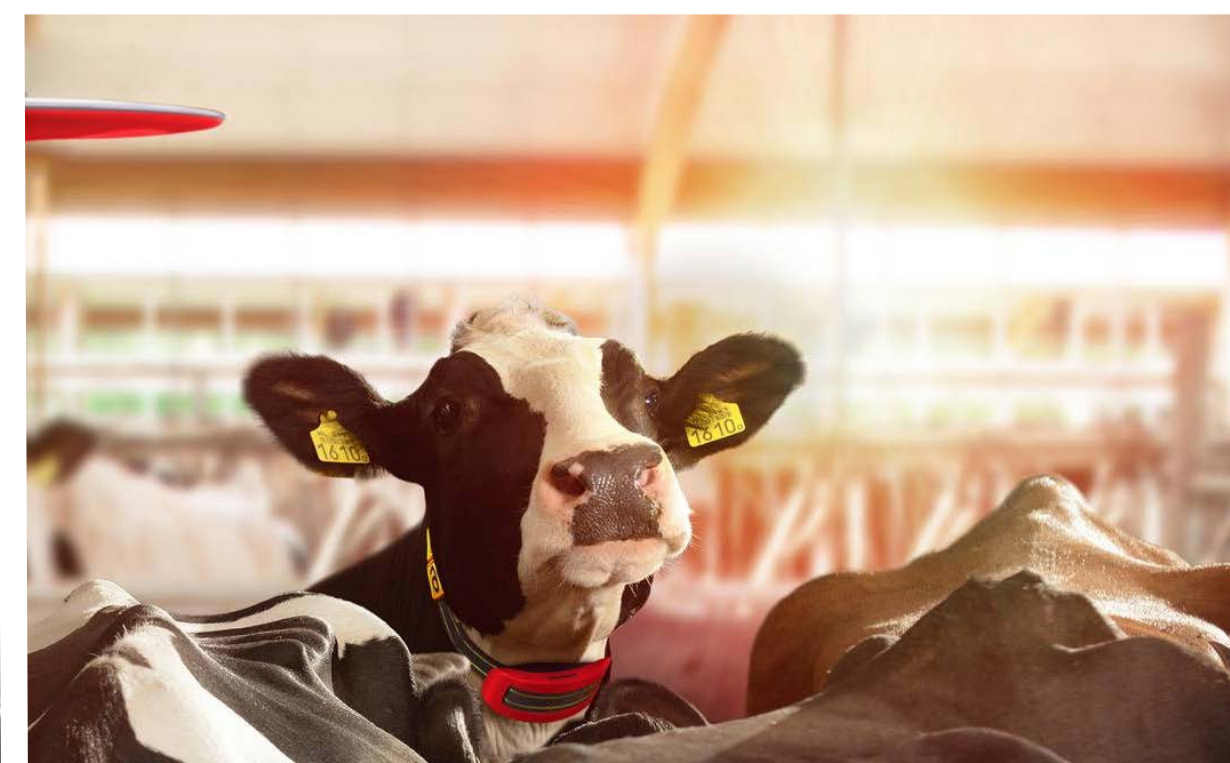
**2012**  
**Lely Vector**







**Innovation  
never  
stops**





# Integrating robotics and data

For cow health,  
welfare and farm  
efficiency.





*Worldwide partner*

*farming innovators*



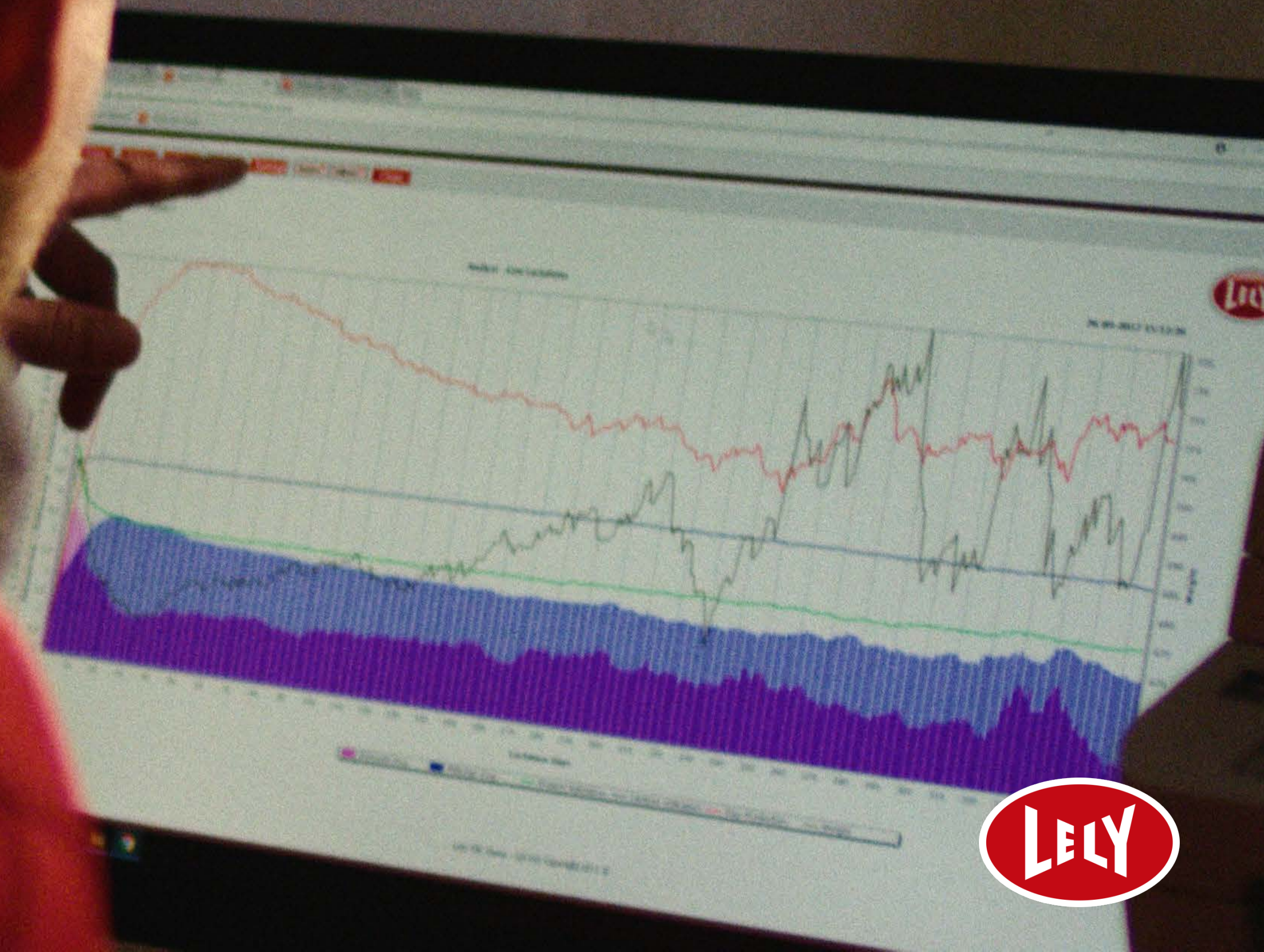


**Long term  
relationships  
is what we value**





# Farm Management Support





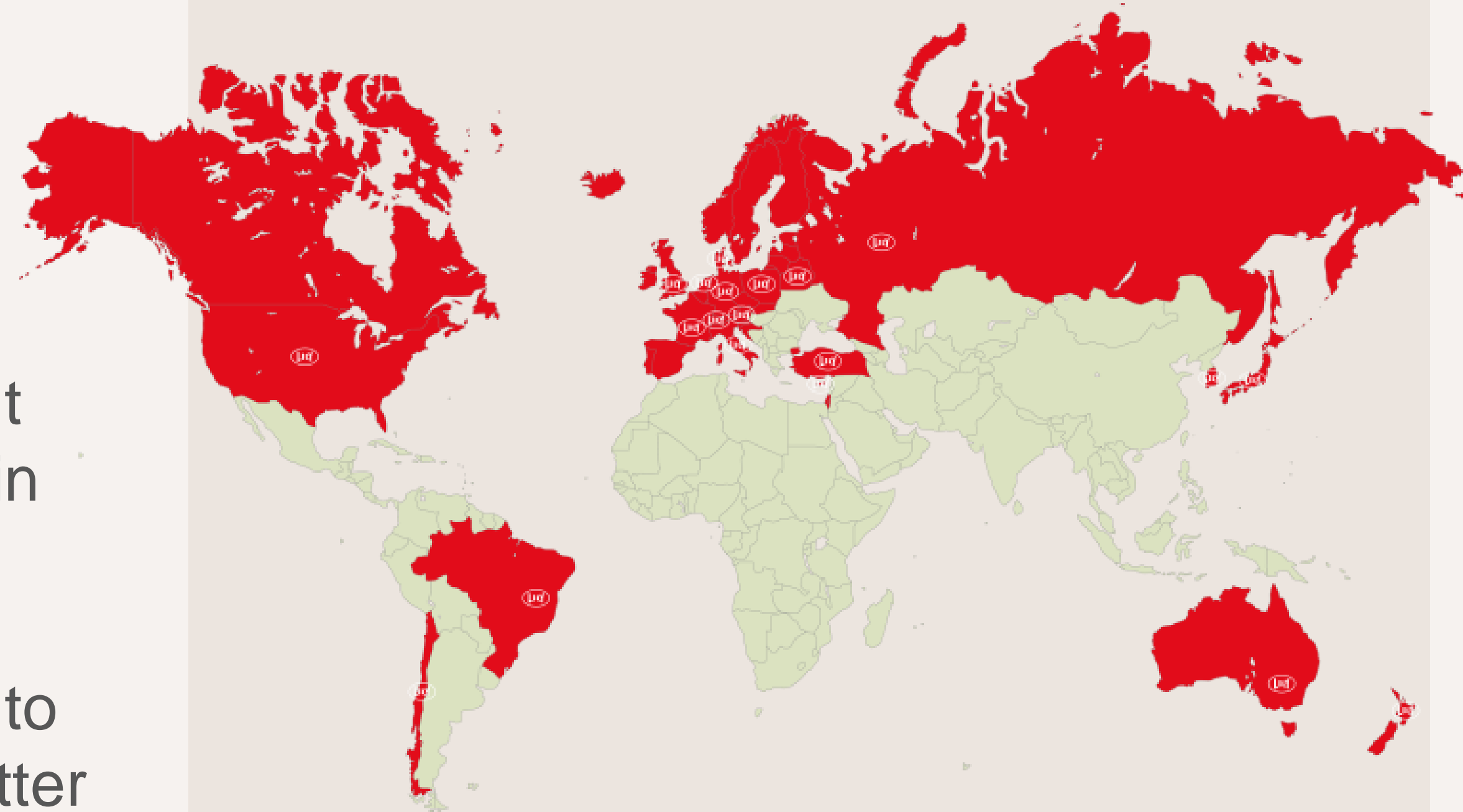
# Farm Management Support

The knowledgeable and dedicated sparring partners of Farm Management Support have a wide field of expertise in optimizing the farm performance

They visit farmers all around the world to help them, with proactive advice, to better utilize their resources and outperform on their individual goals

## Worldwide coverage

Support before, during and after startup to excel in sustainable milk production, forage harvesting and energy sourcing



VISIT 1  
> -3 months

VISIT 2  
T4C installed

VISIT 3  
-1 week

STARTUP

VISIT 4  
+1-3 months

OPTIMISATION  
+6 months

Farm management Support





**Global network  
of 180  
dedicated  
Lely Partners**





**Technicians**  
who speak the  
farmers' language





Automatic-milking

# Cows like consistent milking



Automatic milking





## What automatic milking offers?

- > Increase your milk production
- > The most reliable employee imaginable
- > Healthy cows and a higher well-being
- > Physical and mental relief



Automatic milking





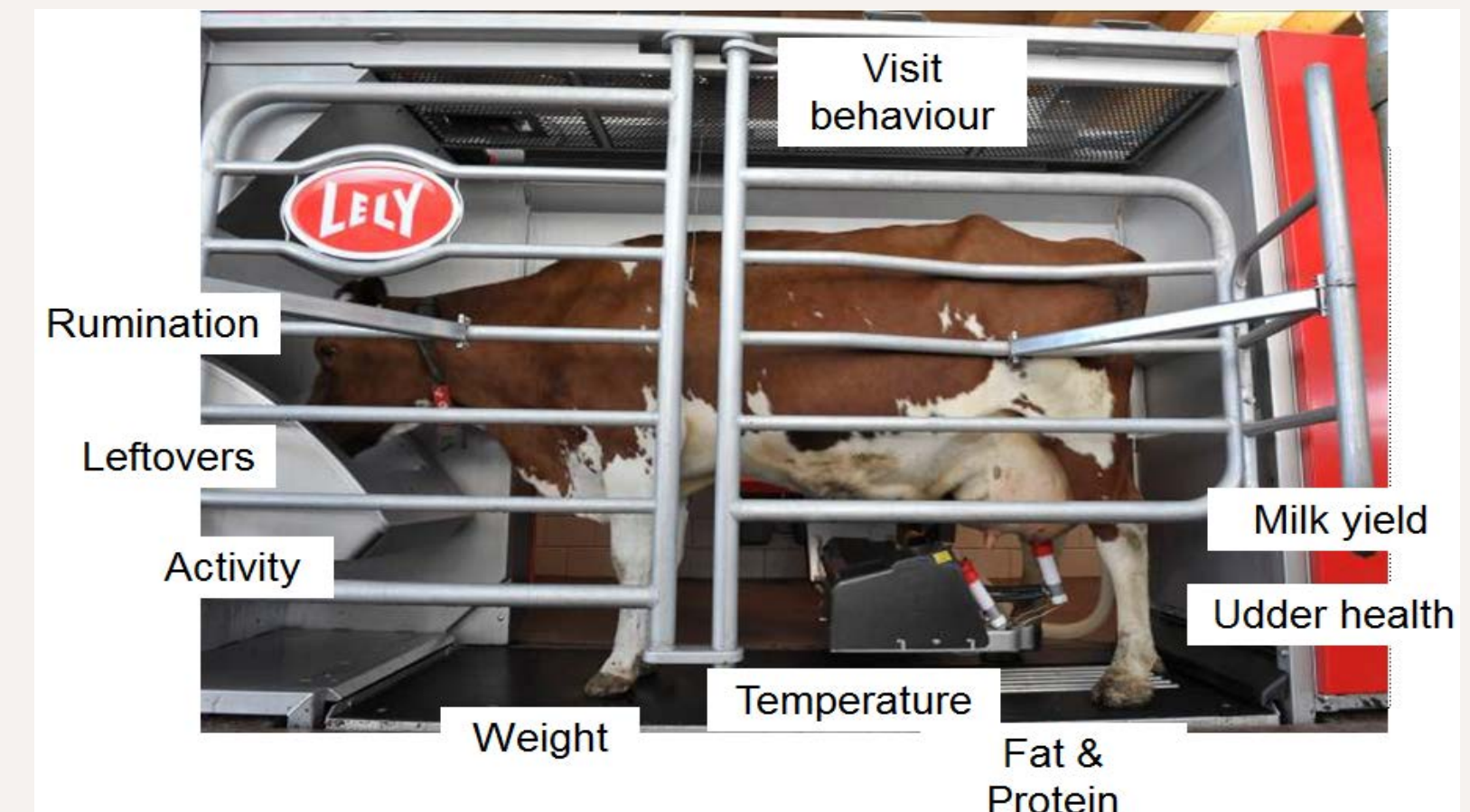
# BENEFITS AUTOMATION

From group to individual cow monitoring



Sensor technology monitors reproduction, health, milk quality, production and feed efficiency

**Management information**



Automatic milking





## Challenges:

**Where are large dairies looking for?**

Cost / benefit of the operation

Less stress with the staff / management

Financing tools

Reliability / good service

Less stress in the herd

Full package of equipment

Barn layout solution

Standard Operational Procedures (SOP's)



Automatic milking





## Labour challenges:

- Labor becomes and will remain a bigger problem:
- Availability are the people there when you need them?
- Quality of labour
- Cheaper labor less reliable,
- Do they understand your farming language?
- High staff turnover – 1 million milkings -
- Retention of labour, repetitive work bad for joints



Automatic milking





## Dairy approach Lely :

Lely Astronaut:

More reliable system (machine + people)

Lower costs due to ever increasing labor costs

Less stress in the herd

***Remark: these figures are based on Western Europe! Saving in labor app 50%!***

### Costs & Benefits – costs of robotic milking versus parlor situation

1000 COWS / 11 MILLION KG/YEAR	PARLOR SITUATION, 3X MILKING	ROBOTIC MILKING
Labor	16 (a 20,000 Euro)	6 (a 25,000 Euro)
Labor costs	320,000 Euro (2.9 cent/kg)	150,000 Euro (1.4 cent/kg)
Annual operational machinery costs	100,000 Euro (0.9 cent/kg)	240,000 Euro (2.2 cent/kg)
Total costs	420,000 Euro (3.8 cent/kg)	390,000 Euro (3.6 cent/kg)



Automatic milking





**Cow freedoms**

**Higher well being of your cows**



Cows Freedom



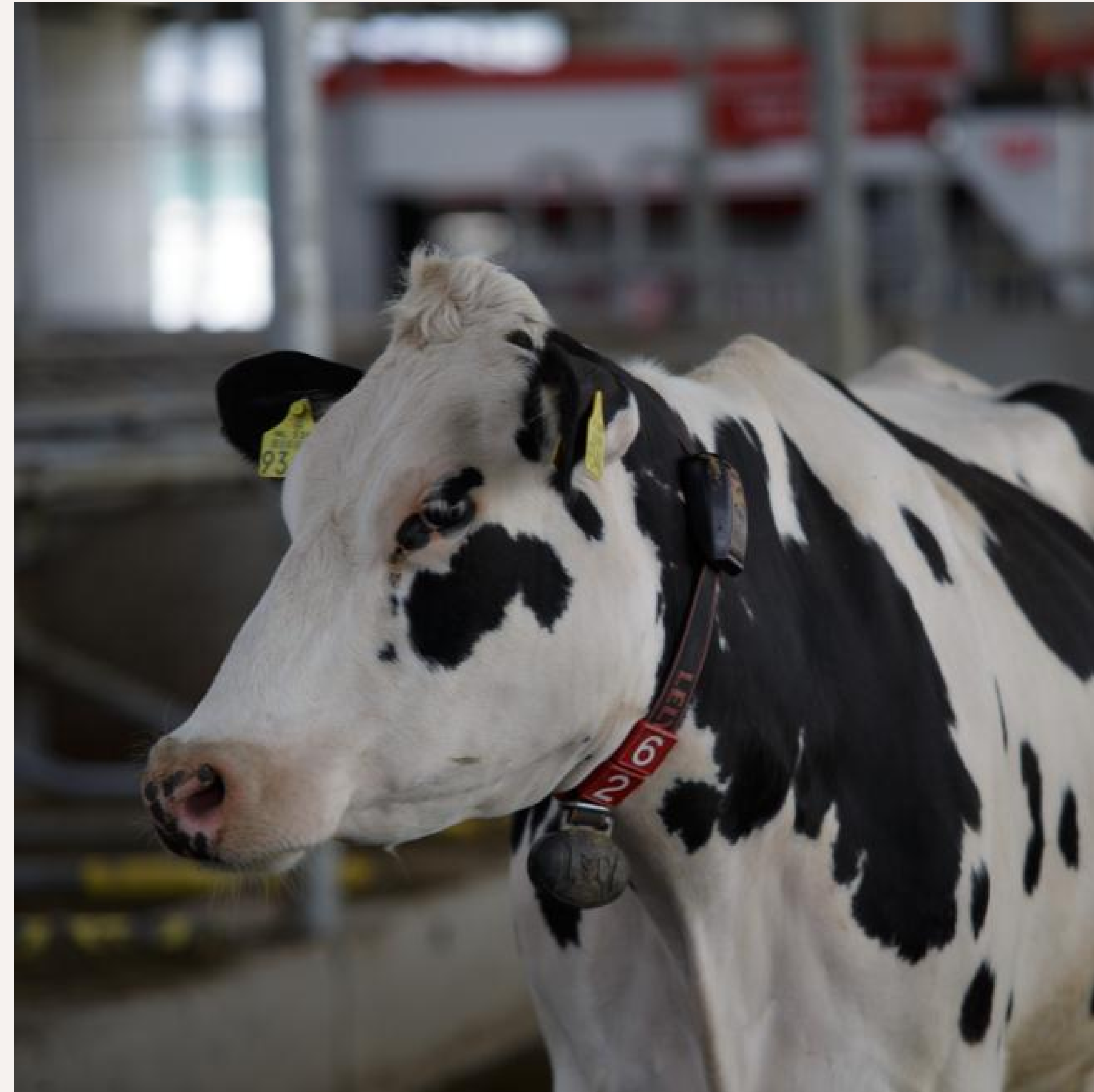


# **Freedom for cows**

## **Higher well being of your cows**

Every cow is free to choose when to eat, drink, lie down or be milked.

This freedom optimizes each individual cow's welfare, comfort and productivity



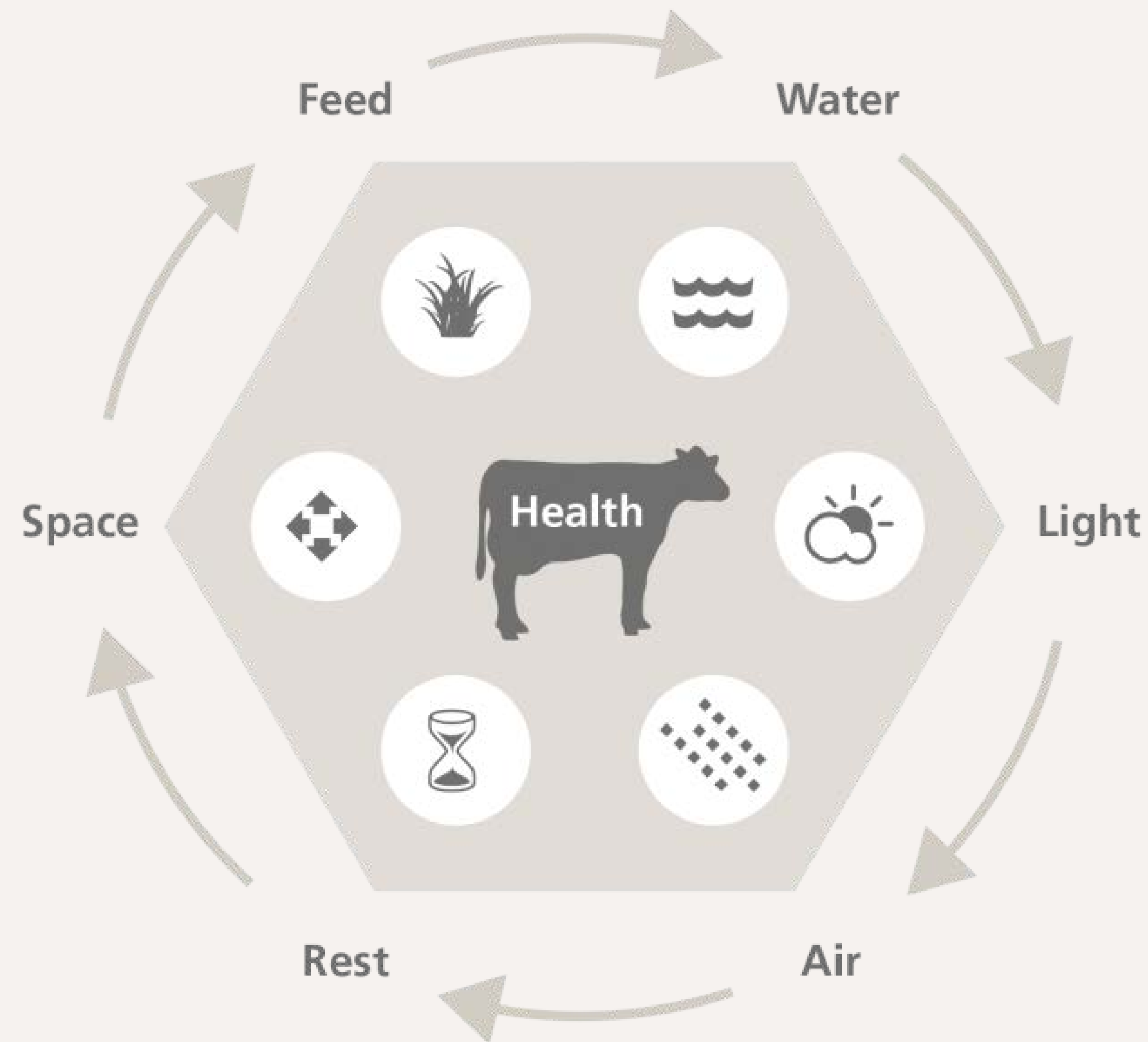
Cows Freedom





# Freedom of the cow

## Cow's natural behavior



Cows Freedom





Lely Cow touches  
9 touches max per lactation



Cow Touches





# Lower input and better output

1. Cows do not have time
2. Situate labour around the cow
3. Management focus increases efficiency

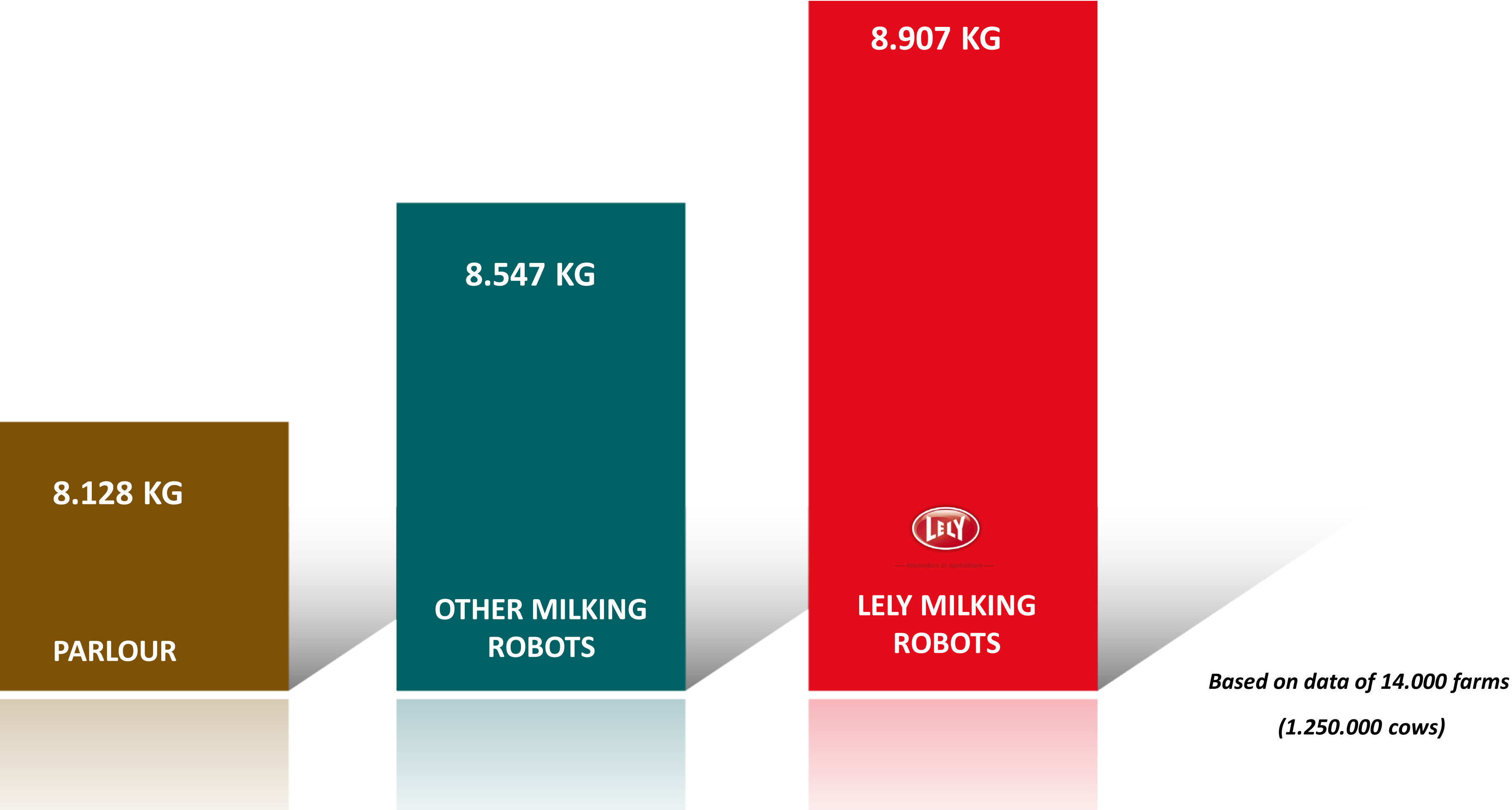


Cow Touches



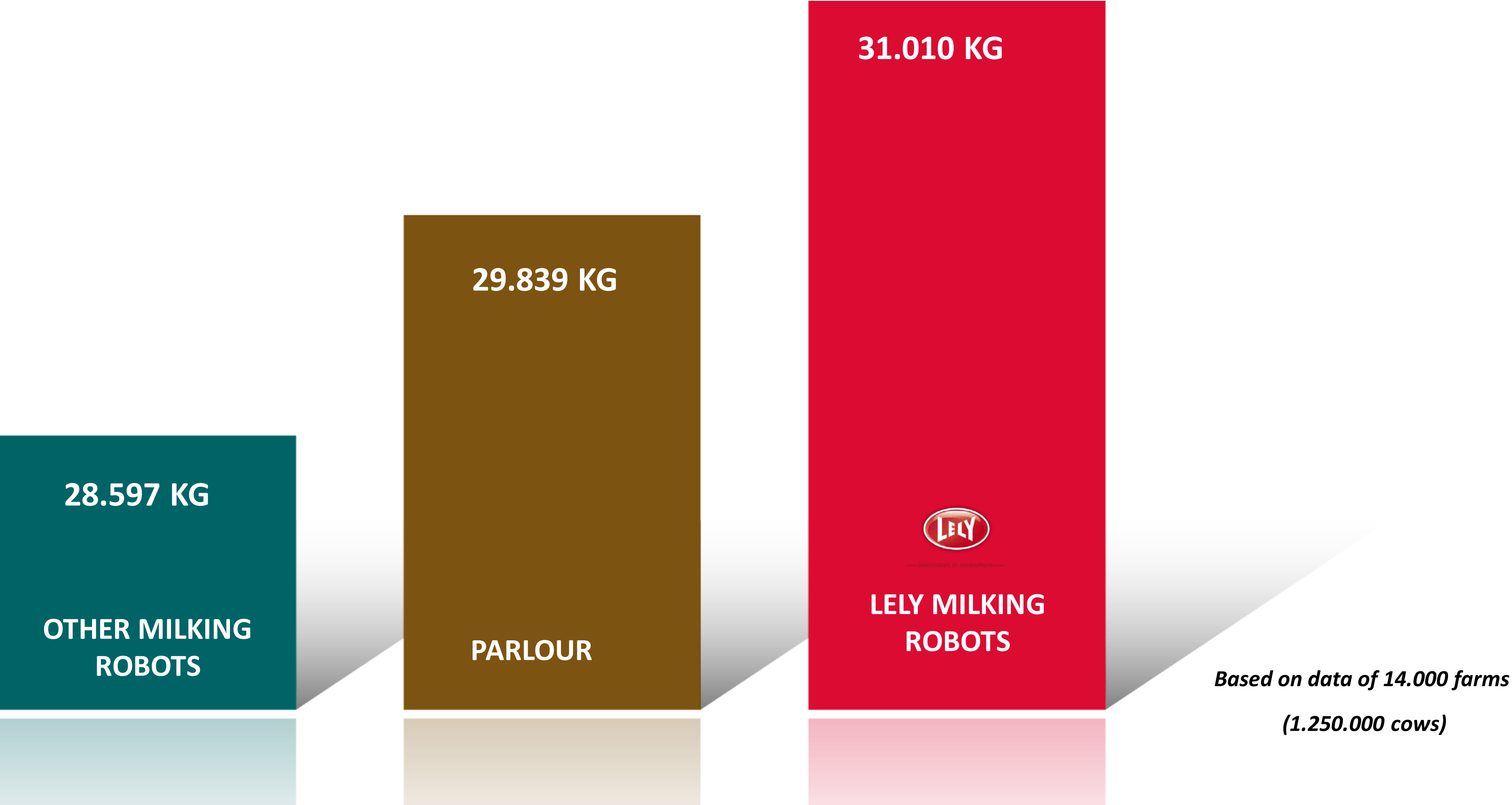


# Milkproduction comparison



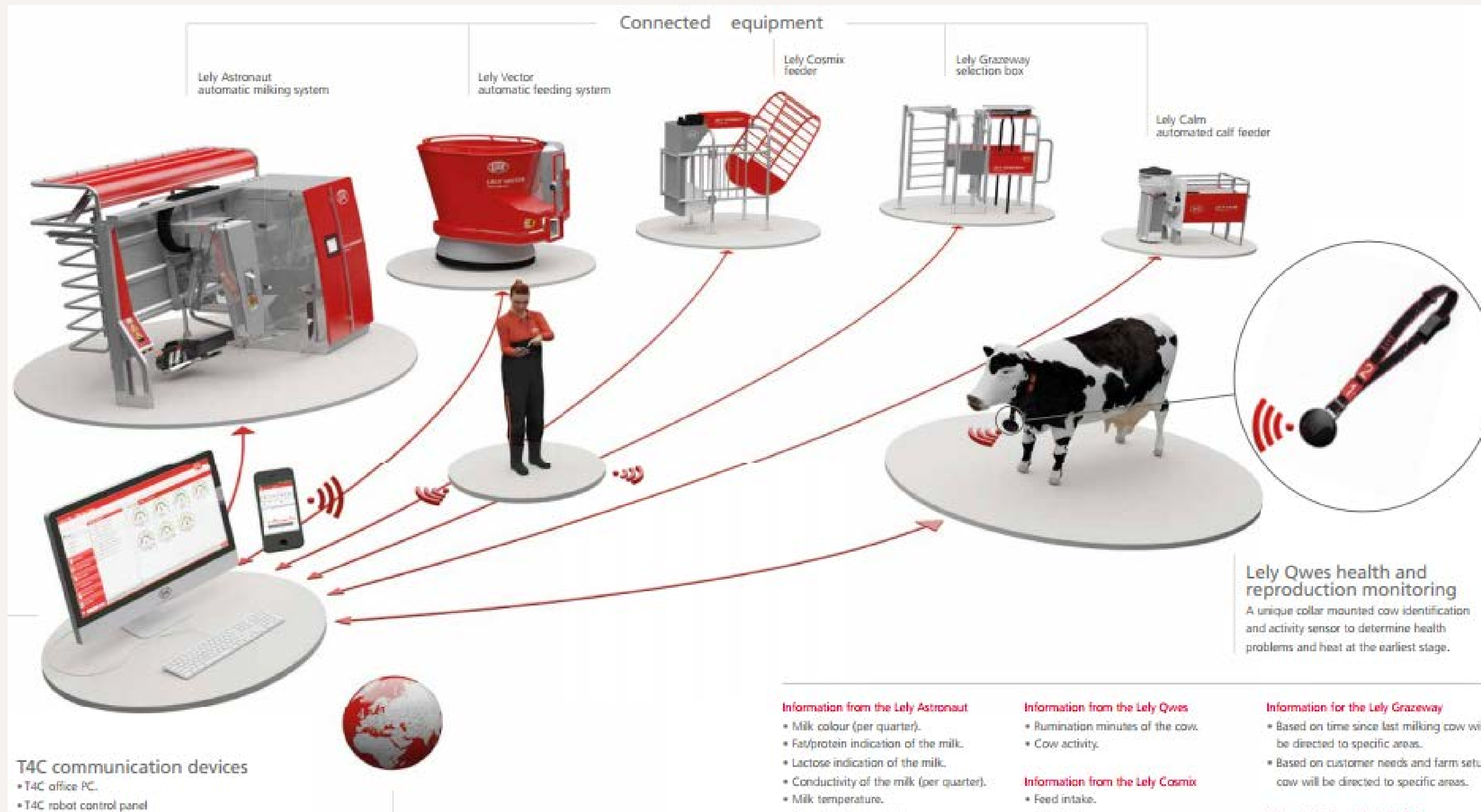


# Lifetime production comparison





# Model farm – smart connection





# Our future





We will continue to innovate and maximise usage of available data sources, always with our customers and vision in mind...





A sustainable, profitable and enjoyable future in farming...





...all the way from grass...to the glass!!





