



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA

# ARGENTINIAN CHAMBER OF AGRIMACHINERY MANUFACTURERS

AGRIEVOLUTION REPORT 2022

# ARGENTINIAN AGRIMACHINERY INDUSTRY

## FIRST APPROACHES



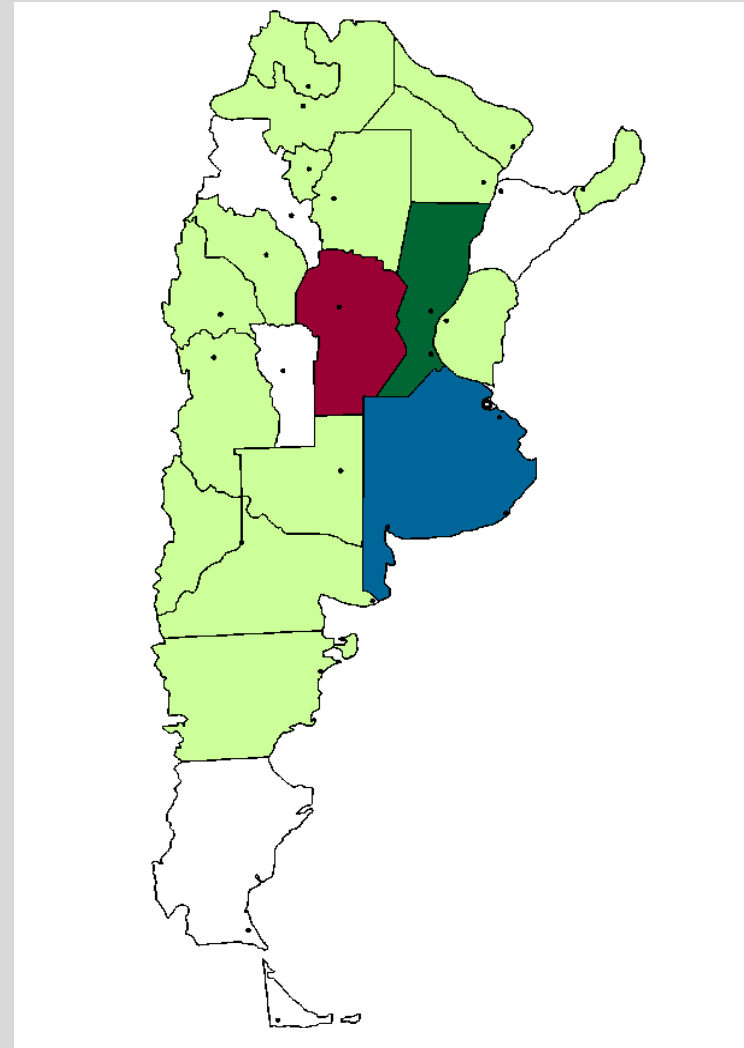
- **1260 companies**
- **51% assembly companies and 49% spare parts.**
- **38,000 direct employments**
- **97% local companies**
- **86% family-owned companies**
- **23% regularly export**
- **25 export destination**
- **88% companies have fewer than 50 employees.**





# ARGENTINIAN AGRIMACHINERY INDUSTRY

## GEOGRAPHICAL DISTRIBUTION



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA



-  Buenos Aires - 15%
-  Santa Fe - 45%
-  Córdoba - 35%
-  Other Provinces - 5%



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA

# ARGENTINIAN AGRICULTURE

## MAIN CROPS

# ARGENTINIAN AGRICULTURE

MAIN CROPS - Percentage of participation in total exports



**CAFMA**

CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA



**SOY  
BEAN**  
27,3%



**WHEAT**  
8,3%



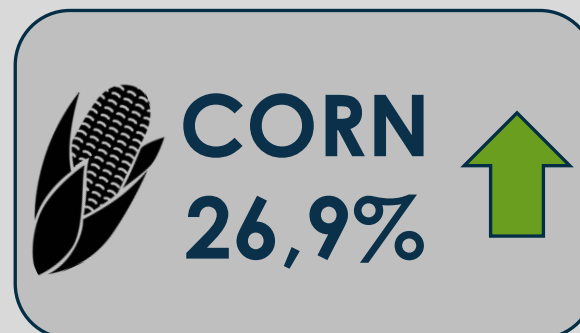
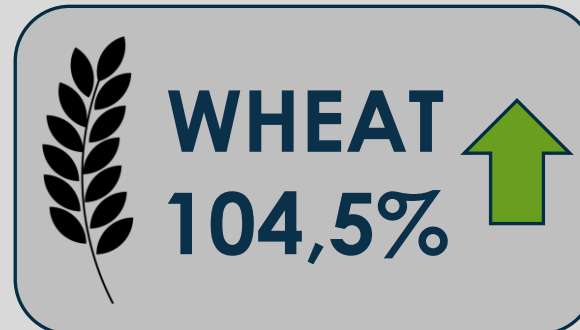
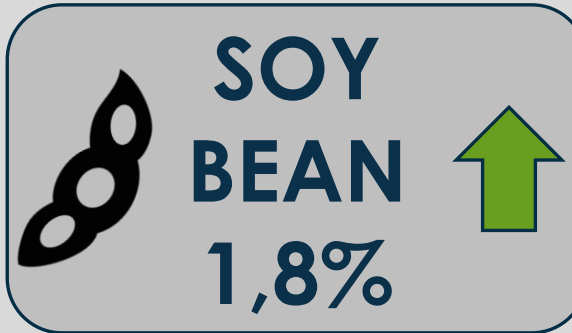
**CORN**  
10,7%

# ARGENTINIAN AGRICULTURE

MAIN CROPS – Exports variation form August 2021 to August 2022



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA

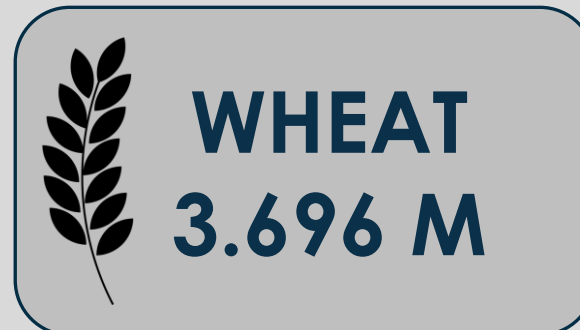


# ARGENTINIAN AGRICULTURE

MAIN CROPS – Total exports in million dollars – First Semester 2022



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA




# 2021/2022 CAMPAIGN RESULTS

## MAIN PRODUCTS



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA

SOY BEAN		
	2021/22 Campaign	2020/21 Comparison
Sown	16.300.000 ha	-600.00 ha
Yield	27,9 qq/ha	+4,1%
Total Production	43.300.000 tn	+200.000 tn




# 2021/2022 CAMPAIGN RESULTS

## MAIN PRODUCTS



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA


<b>WHEAT</b>		
	<b>2021/22 Campaigning</b>	<b>2020/21 Comparison</b>
<b>Sown</b>	6.600.000 ha	+100.00 ha
<b>Yield</b>	34,4 qq/ha	+21,9%
<b>Total Production</b>	21.800.000 tn	+4.800.000 tn

# 2021/2022 CAMPAIGN RESULTS

## MAIN PRODUCTS



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA

CORN		
	2021/22 Campaigning	2020/21 Comparison
Sown	7.700.000 ha	+1.100,000 ha
Yield	69,9 qq/ha	-9,4%
Total Production	52.000.000 tn	-2.860.000 tn

# PRODUCTION EVOLUTION

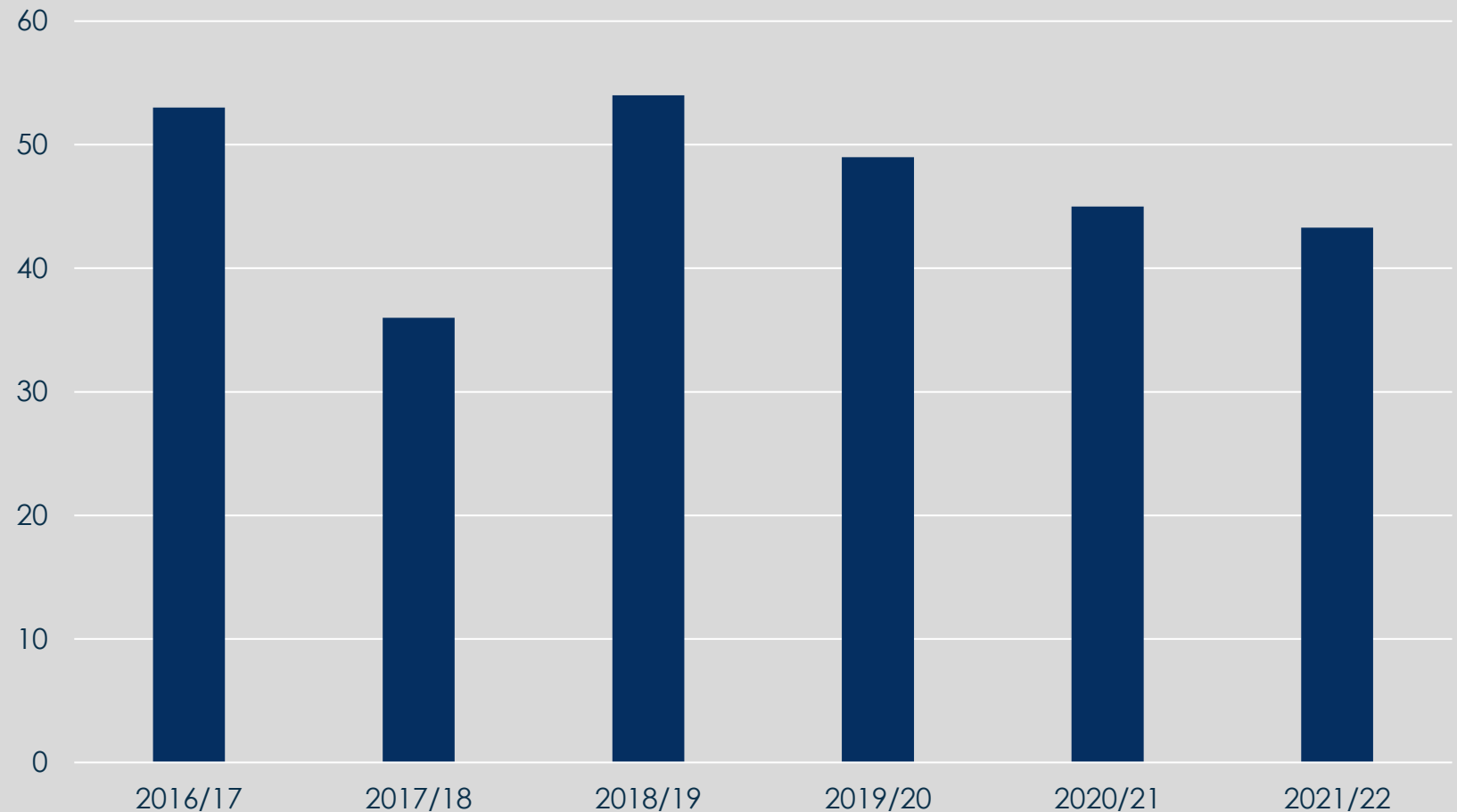
## SOY BEAN



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA



Production (MTn)

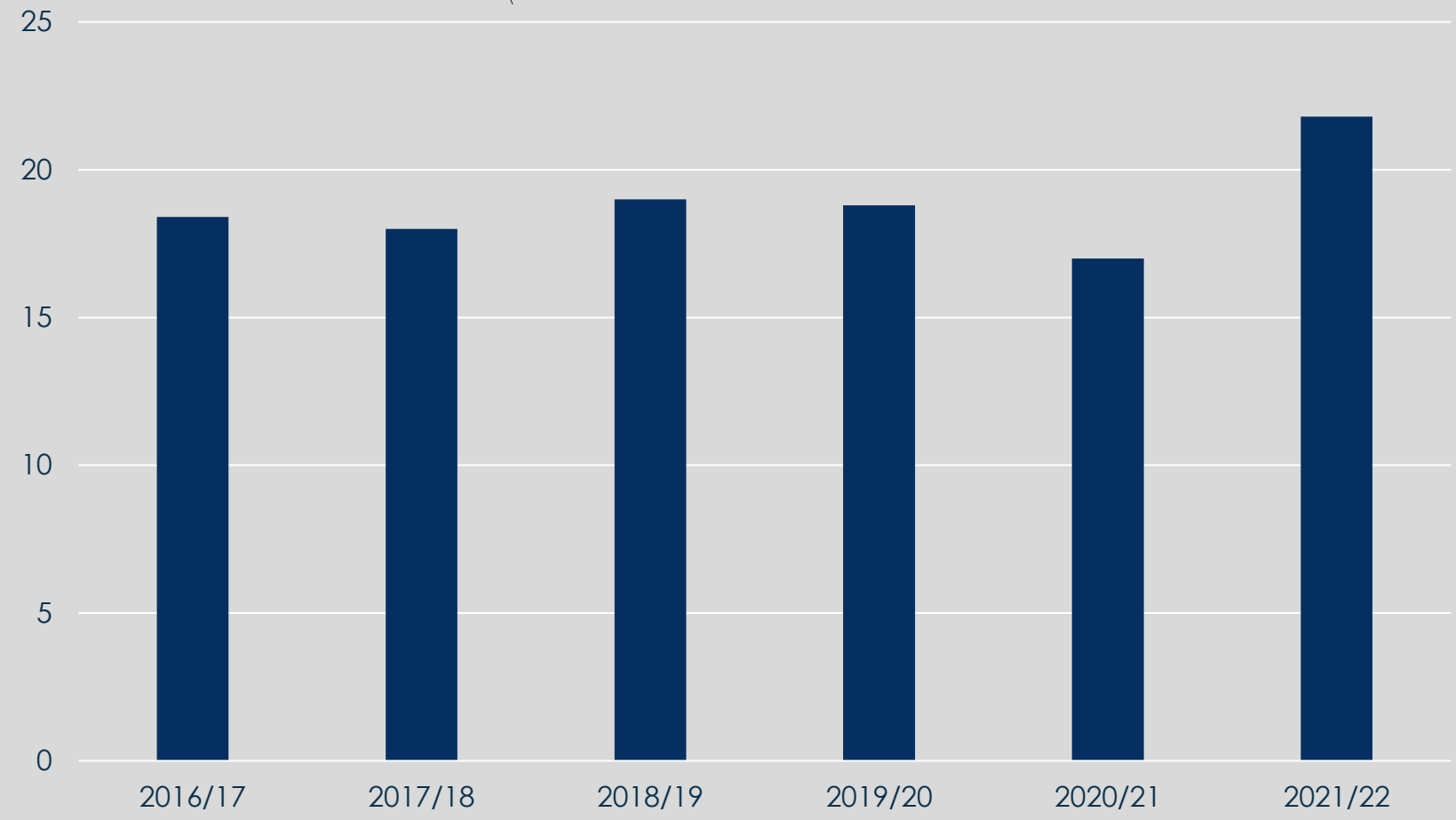


# PRODUCTION EVOLUTION

## WHEAT



Production (MTn)



Source: Bolsa de Cereales / INTA

■ Production (MTn)

# PRODUCTION EVOLUTION

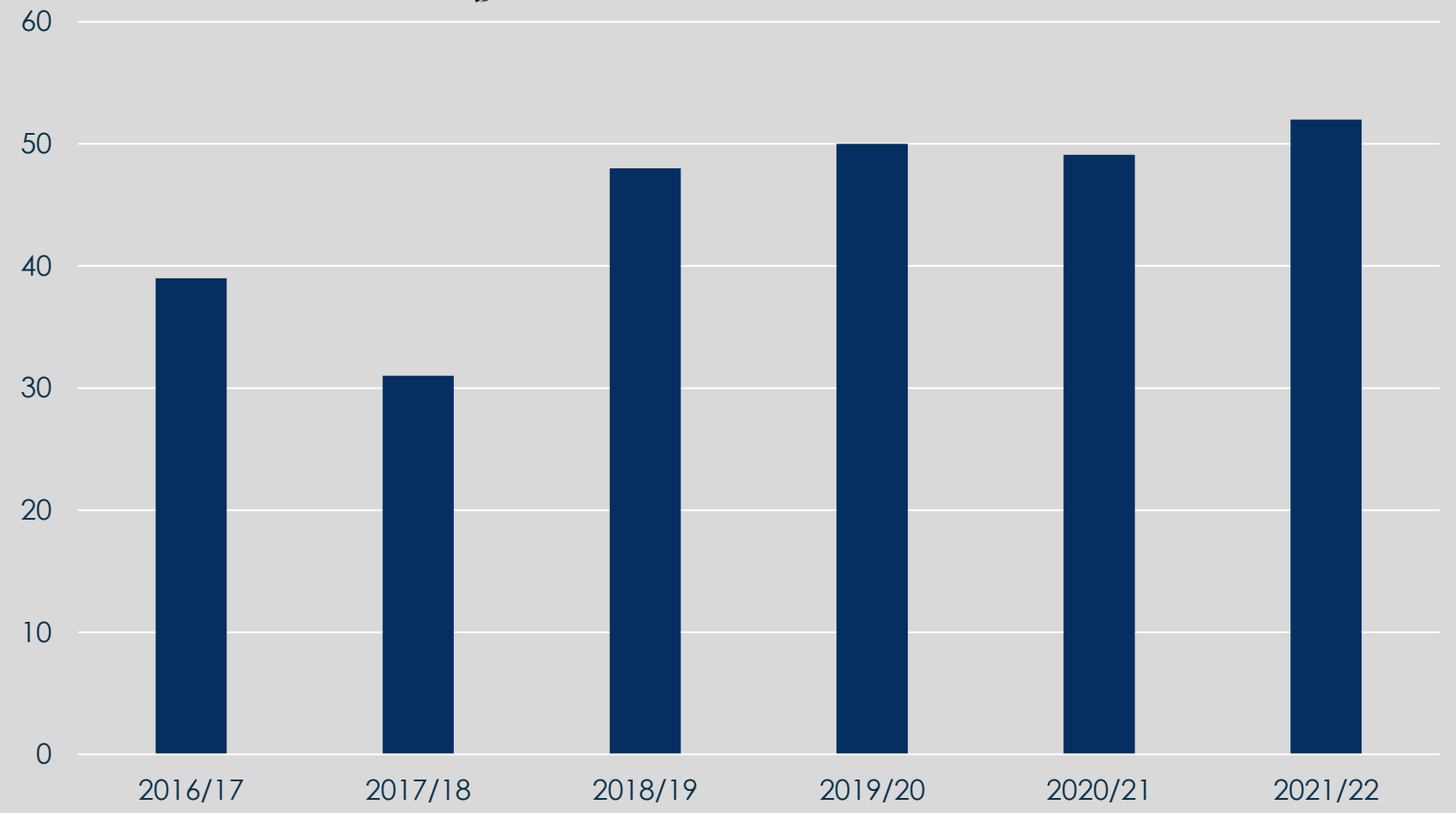
## CORN



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA



Production (MTn)



■ Production (MTn)

Source: Bolsa de Cereales



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA

# ARGENTINIAN AGRIMACHINERY MARKET

# ARGENTINIAN AGRIMACHINERY MARKET



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA

**TOTAL SALES – First Semester 2021/22 – In units**

TOTAL SALES		
PRODUCT	2021	2022
Harvesters	418	592
Tractors	3187	4028
Planters	1181	1308
Sprayers	600	590
Grain storage and hauling machinery	2194	2067

# CONCLUSIONS



- **The wheat campaign has been record, both in its sowing and in its results**
- **The forecasts for the near future are discouraging, due to the approaching drought**
- **The increase in interest rates adds to this situation, affecting the possibility of buying**



Attached from June Report



# ARGENTINIAN AGRIMACHINERY INDUSTRY

# PLANTERS

NATIONAL PRODUCTION 2010-2021



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA

PLANTERS

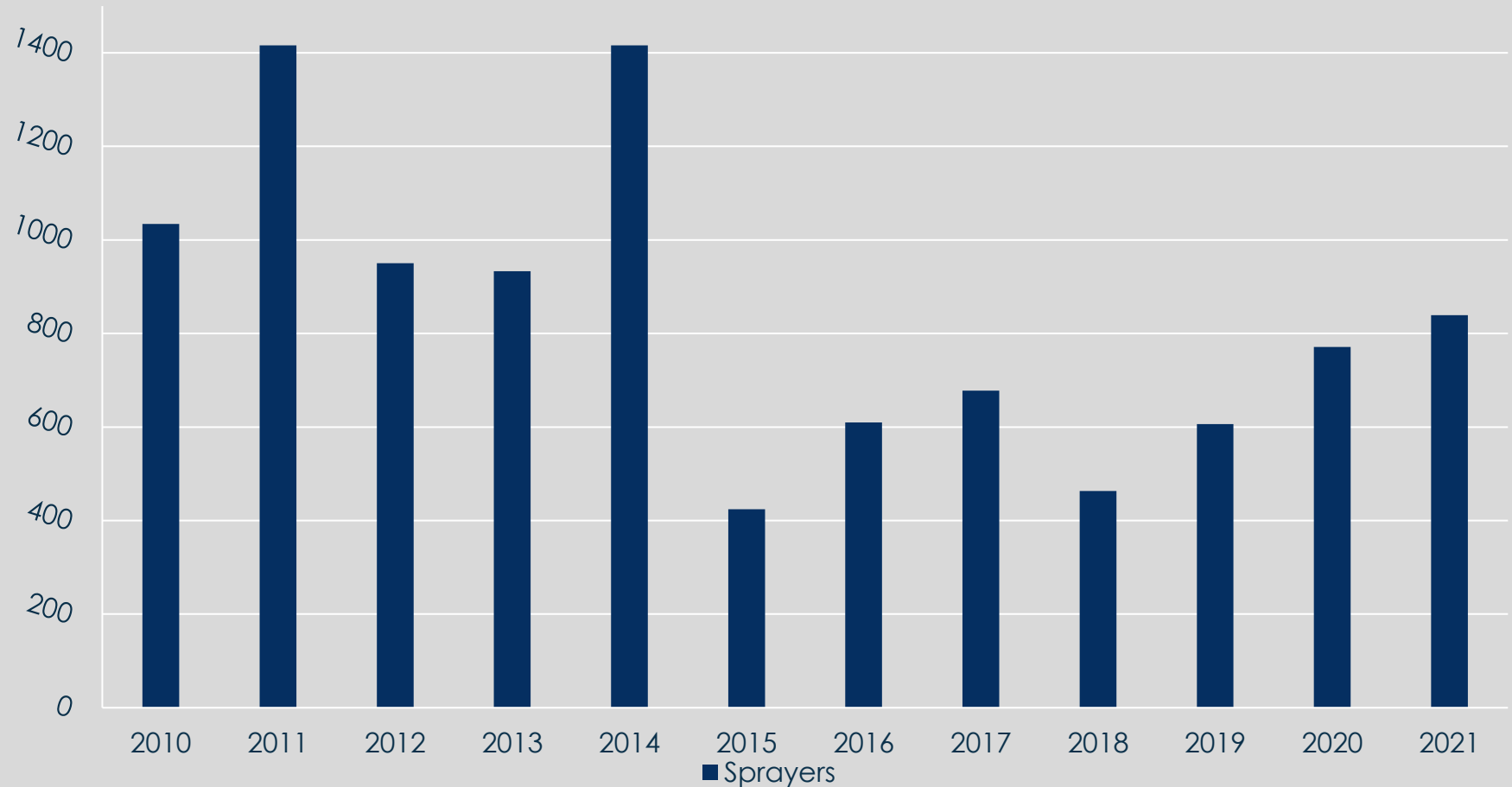


# SPRAYERS

NATIONAL PRODUCTION 2010-2021



## SPRAYERS



Source: INDEC

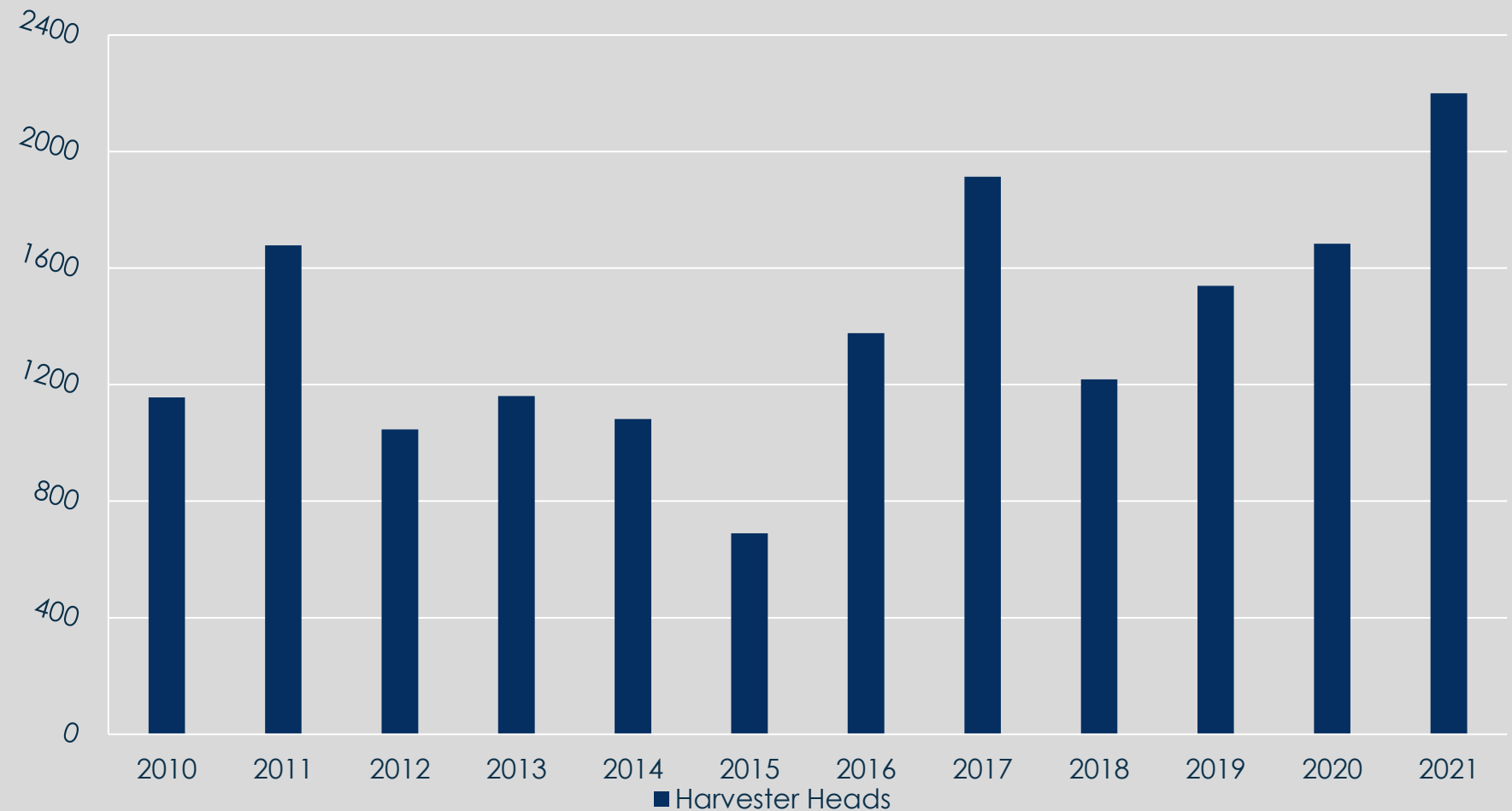
# HARVESTER HEADS

NATIONAL PRODUCTION 2010-2021 in units



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA

## HARVESTER HEADS



# TRACTORS

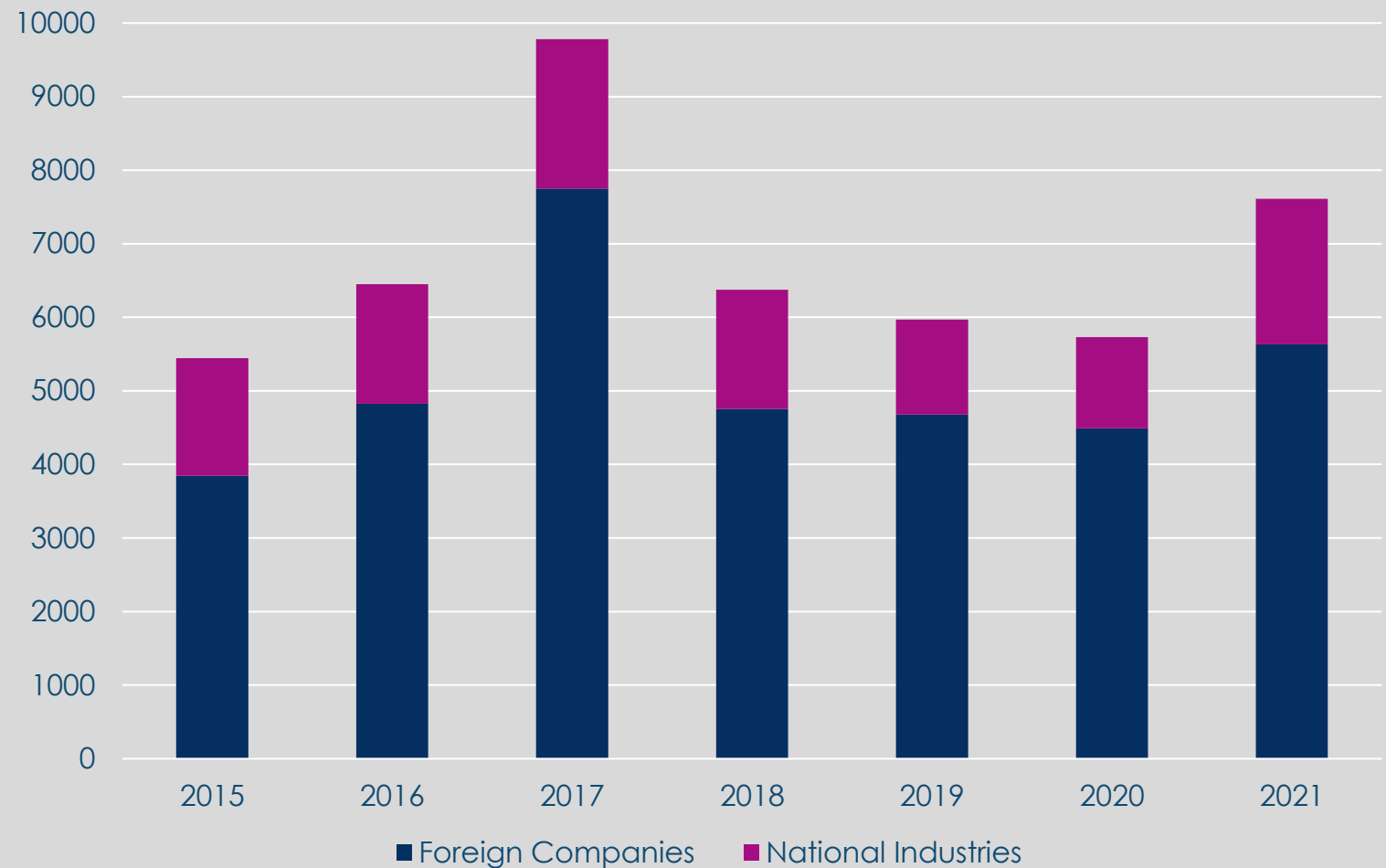
TOTAL SALES 2015 – 2021 in units



**CAFMA**

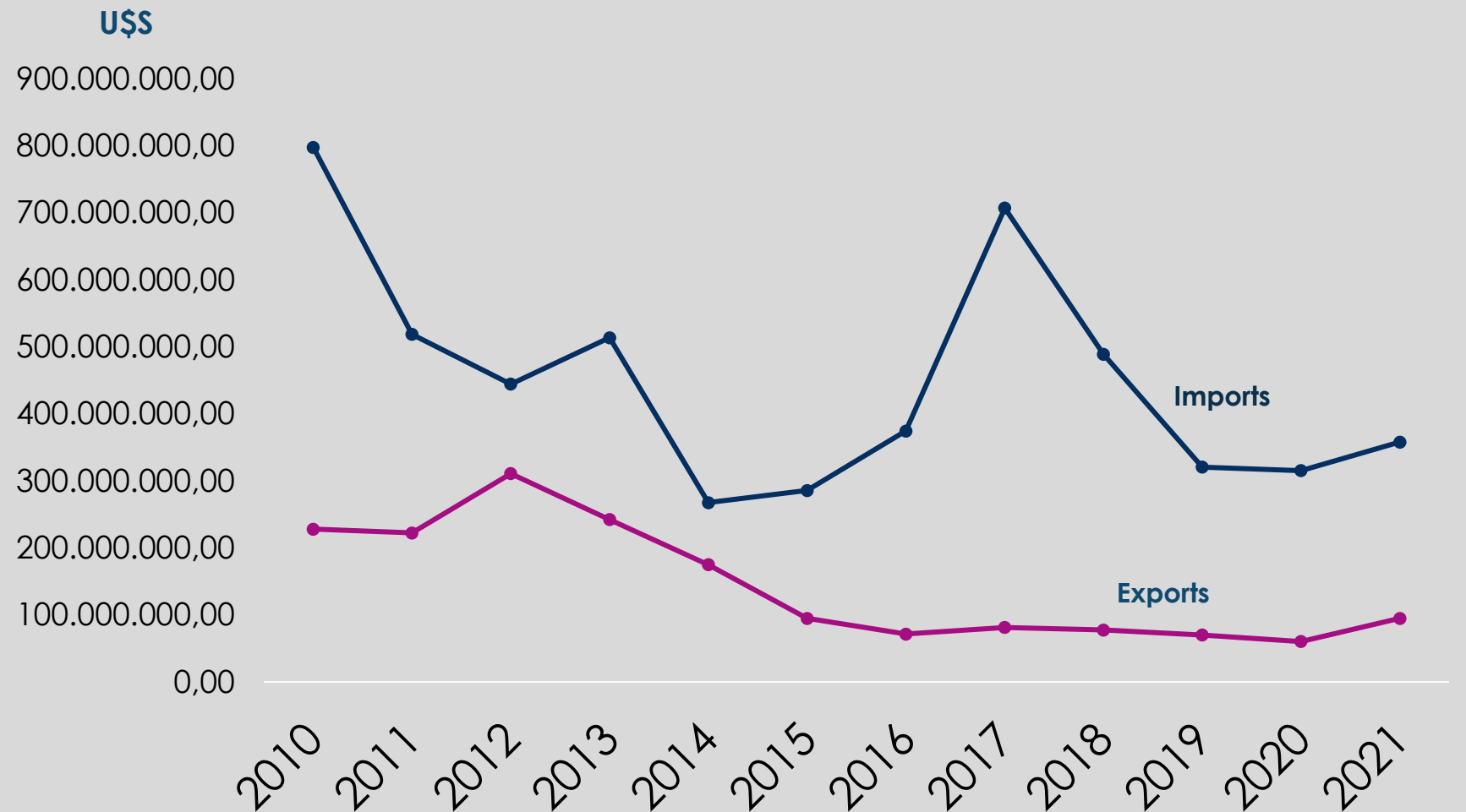
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA

Tractors



# IMPORTS - EXPORTS

EVOLUTION 2010 - 2021



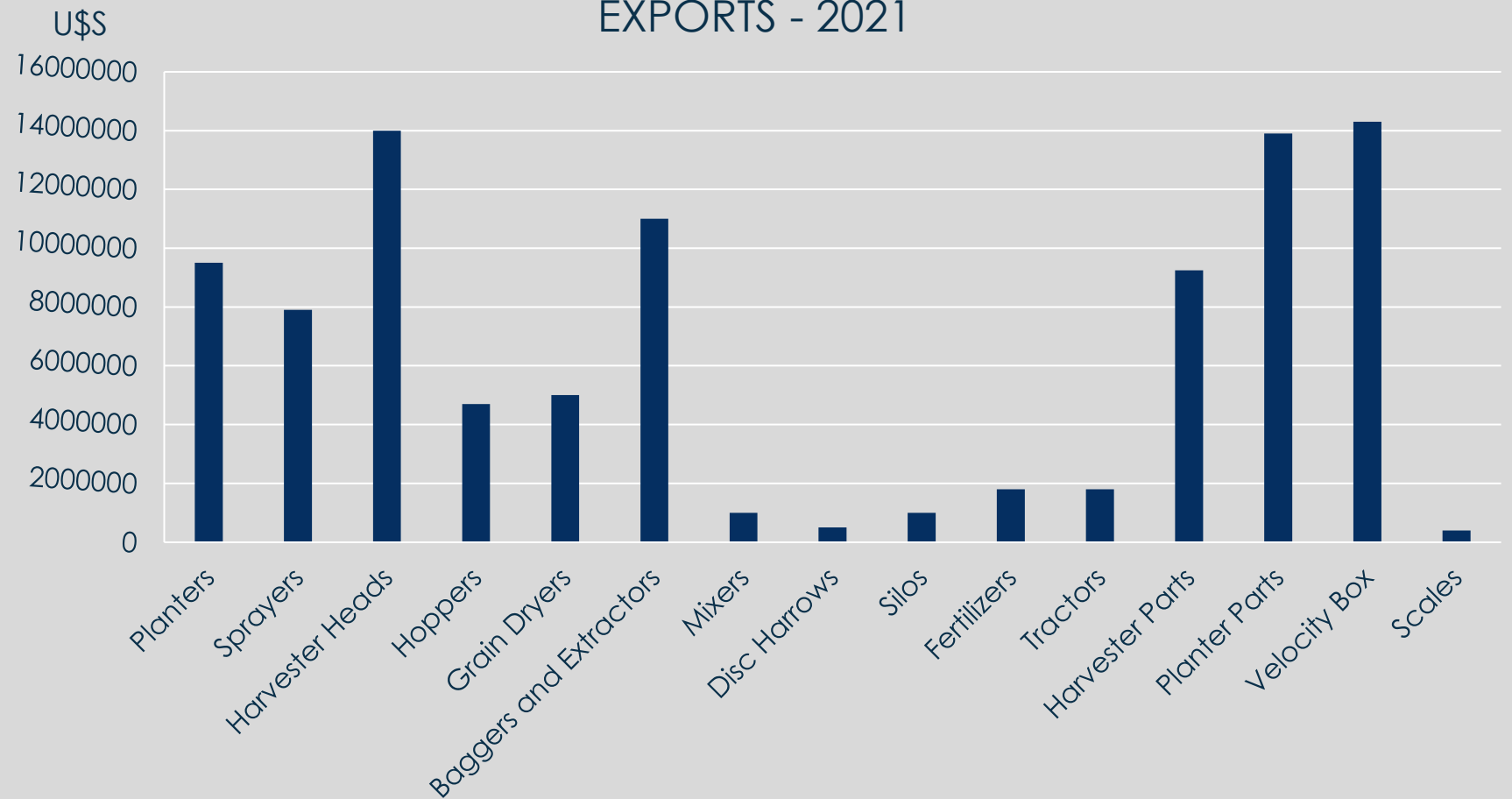
# EXPORTS

BY ITEM, 2021



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA

EXPORTS - 2021



# EXPORTS BY DESTINY

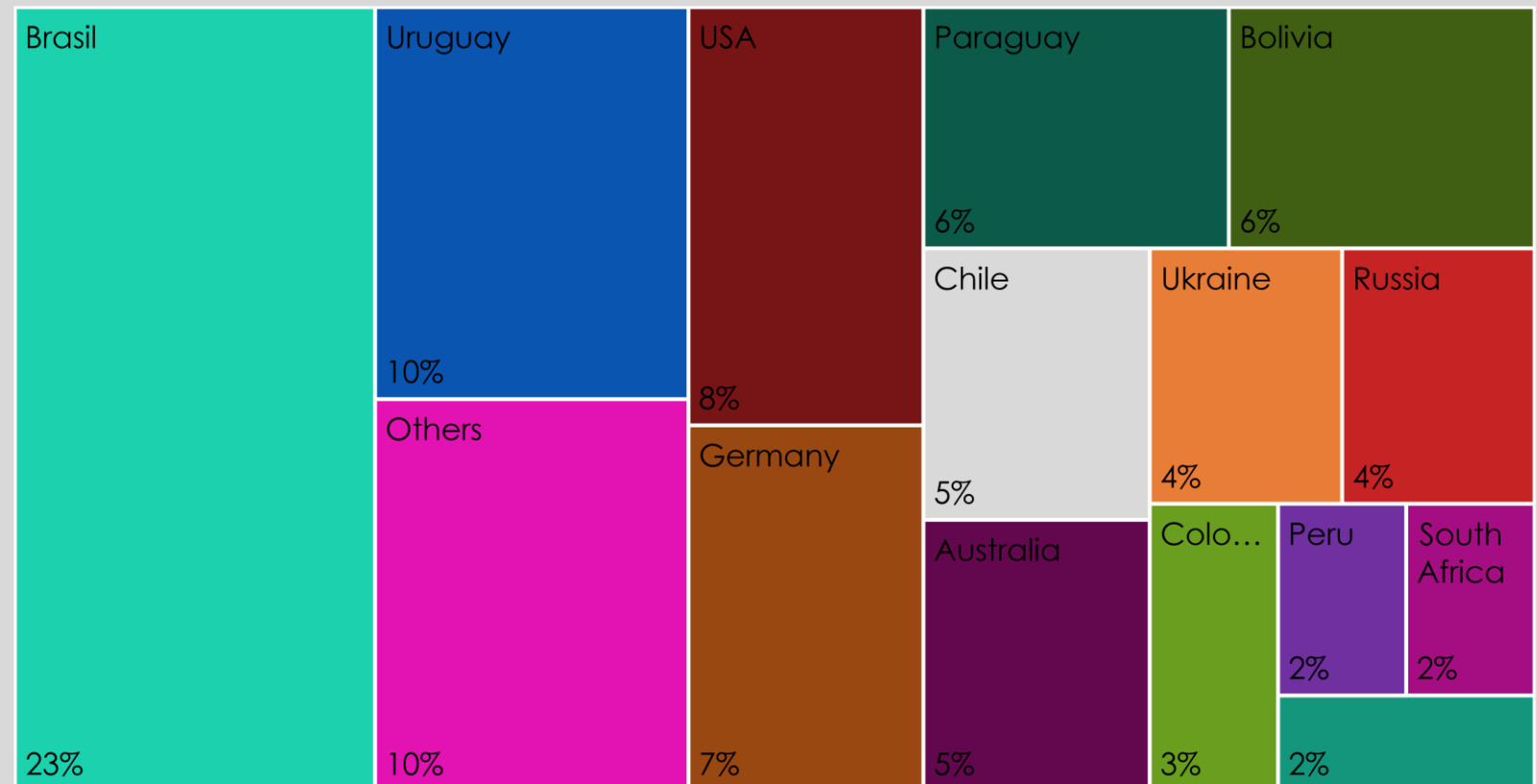
IN PERCENTAJE OF PARTICIPATION, 2021



**CAFMA**  
CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA

## Exports

- Peru
- South Africa
- Spain
- Colombia
- Ukraine
- Russia
- Chile
- Australia
- Paraguay
- Bolivia
- Germany
- USA
- Uruguay
- Others
- Brasil





# IMPORTS BY ORIGIN

IN PERCENTAJE OF PARTICIPATION, 2021



# CAFMA

CAMARA ARGENTINA FABRICANTES DE MAQUINARIA AGRICOLA

## Imports

■ Spain ■ France ■ Mexico ■ Italy ■ Germany ■ Others ■ China ■ USA ■ Brasil

