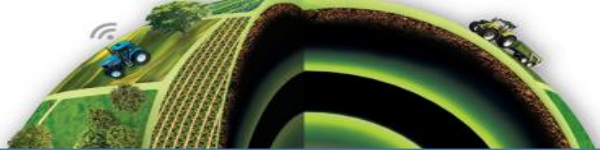


FEDERUNACOMA

Federica Tugnoli  
Agrievolution Economic Committee  
18 October 2022





## OVERALL PICTURE - 2022

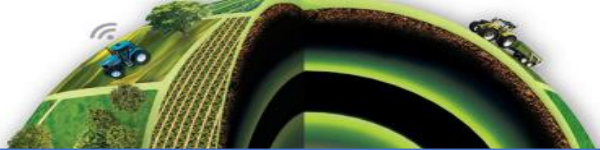
Annual and quarterly dynamics of the entire economy and of the agri-food sector (% variation)

	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022
<b>GDP</b>						
GDP at market prices *	6,6	17,5	4	6,4	6,3	4,7
Agricultural VA *	-0,8	2,1	-2,7	-2	0,4	-0,7
<b>OCCUPATION</b>						
Total	0,6	1,7	1,5	1,5	1,9	2,2
Agricultural *	-0,1	6,1	-1,8	-5,5	-8,8	-2,8

\* Concatenated values

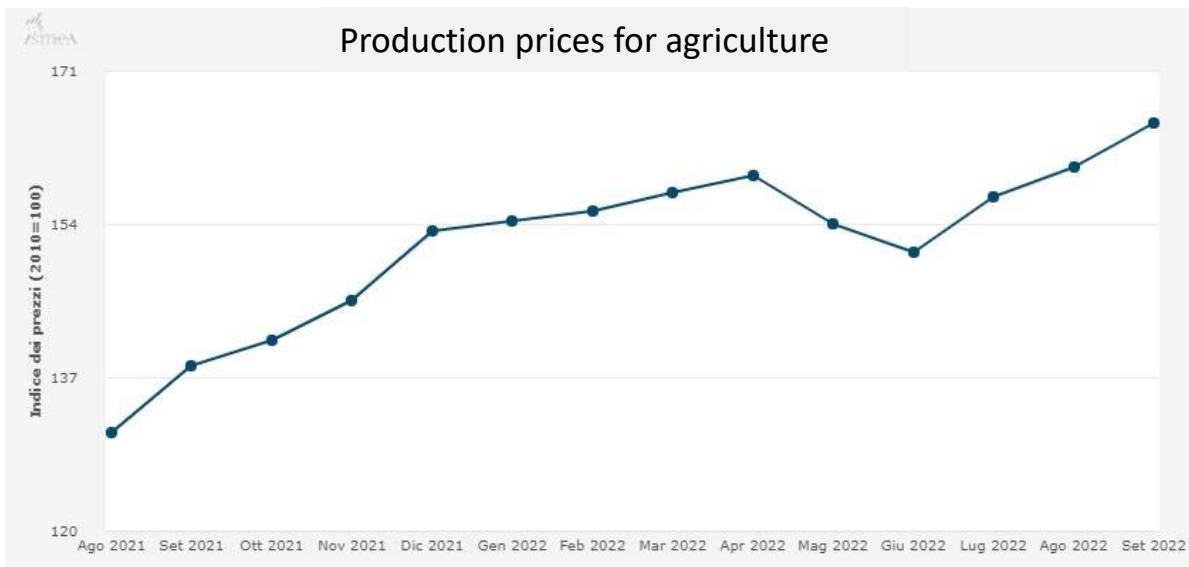
Source: Ismea elaboration on Istat data

In the second quarter of 2022, the value added of the agricultural sector recorded a slight decline on an annual basis (-0.7%), while the number of employees fell by almost 3% compared to one year ago



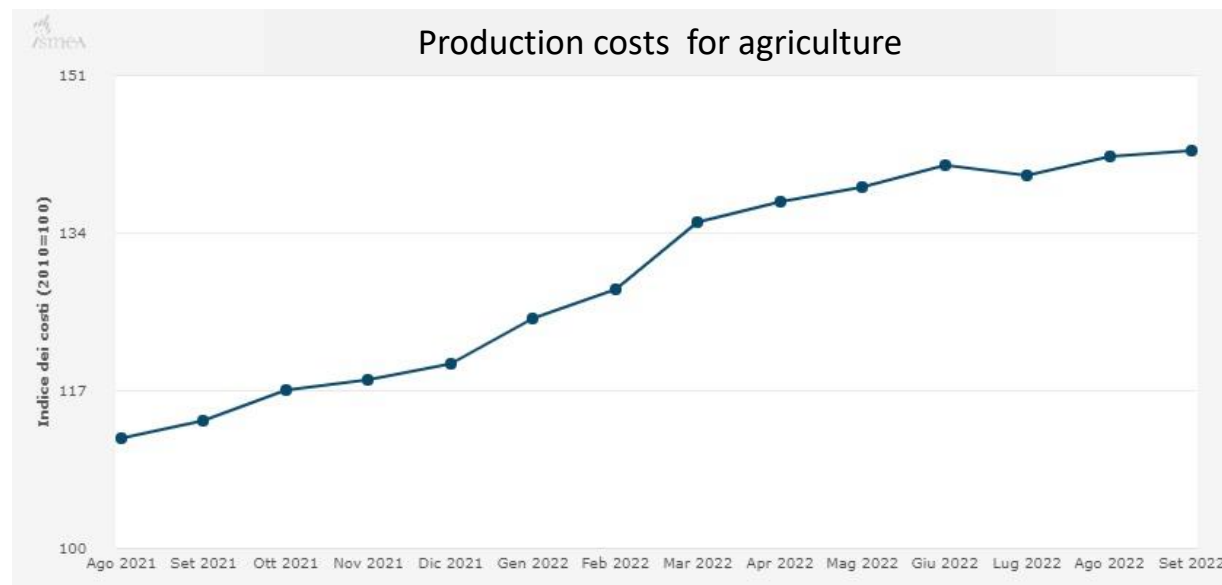
## FARM INCOME - 2022

+3.1% on August 22  
+19.5% on September 21



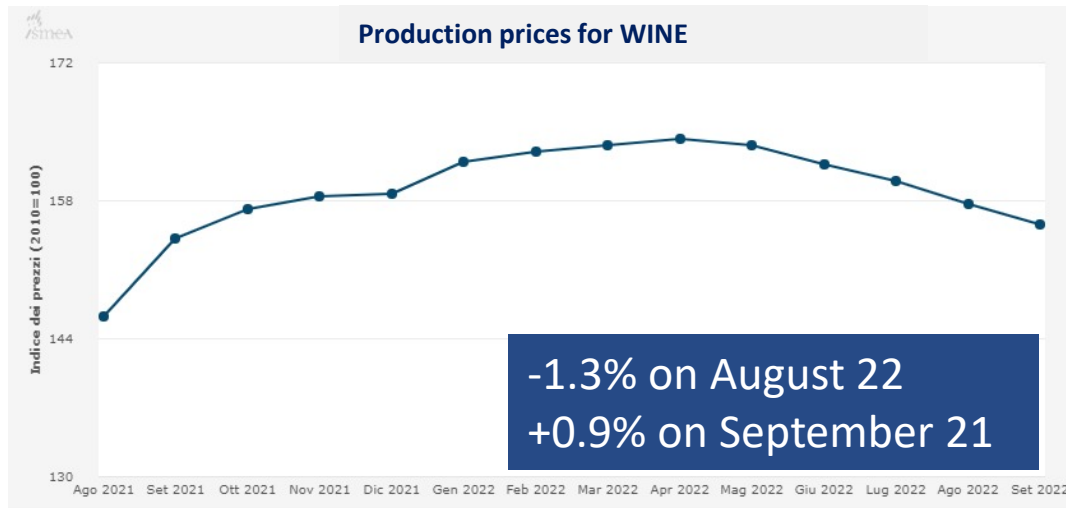
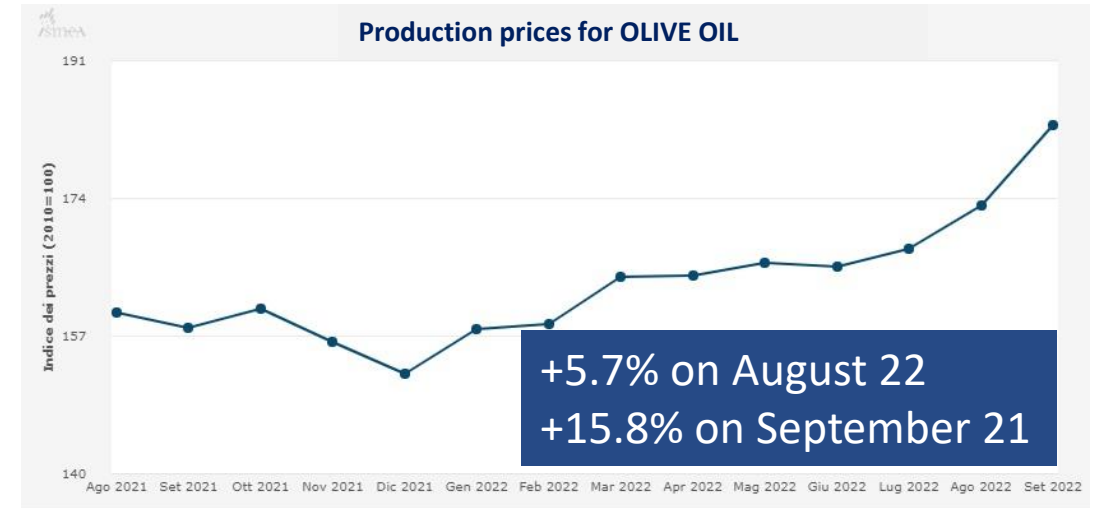
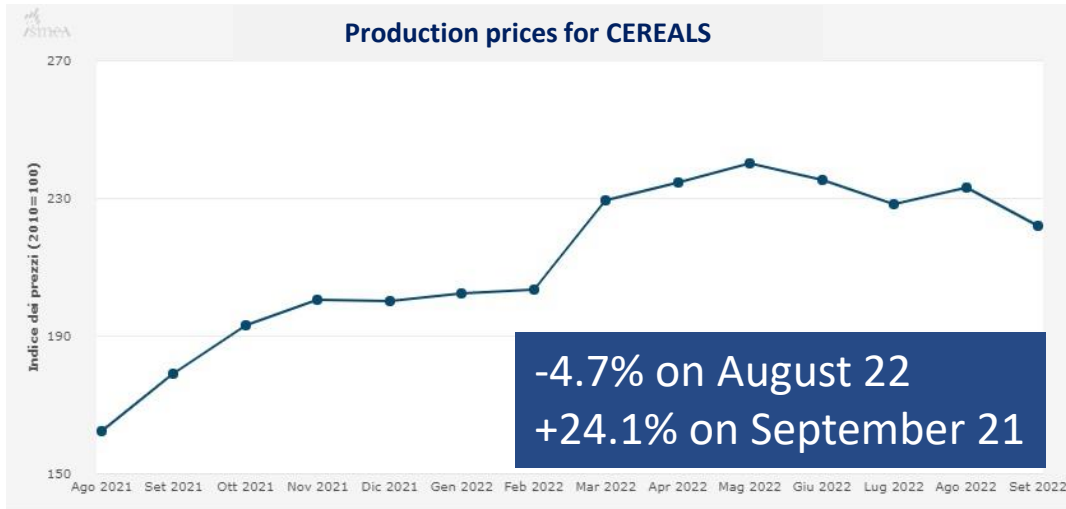
Worsening of the terms of trade

+0.4% on August 22  
+25.7% on September 21





# AGRICULTURAL PRICES - 2022



**Worsening of the terms of trade**



# HOW ITALIAN AGRICULTURE CHANGES

## 7° Census of Agriculture

**1.133.023**  
**(-30.1%)**

Farms



**1,120,524**

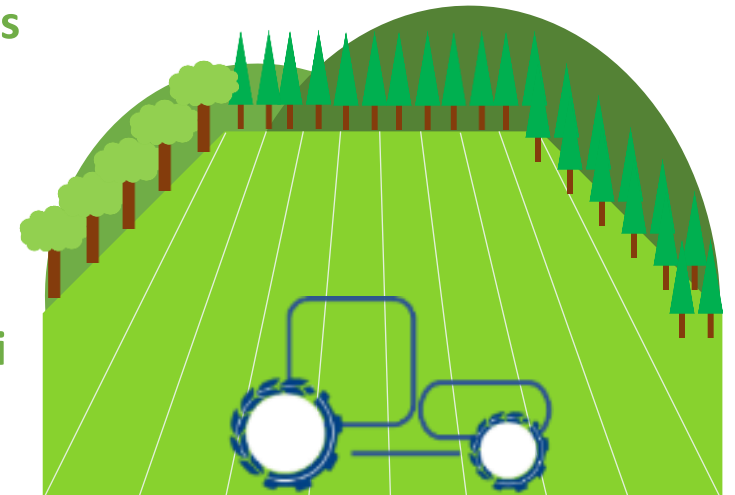
Farms with utilised agricultural area  
(UAA)

**16.5** million hectares  
**(-3.6%)**

Total agricultural area

**12.5** milioni di ettari  
**(-2.5%)**

Utilised agricultural area





## THE KEY ROLE OF INNOVATION

### INNOVATIONS

In 2018-2020 period

**248.275** total innovations

**124.904** companies involved in innovative processes

### Area of innovation (% of total innovations)

**41%**  
**Crops**

**10%**  
**Livestock**

**49%**  
**Other  
innovations**

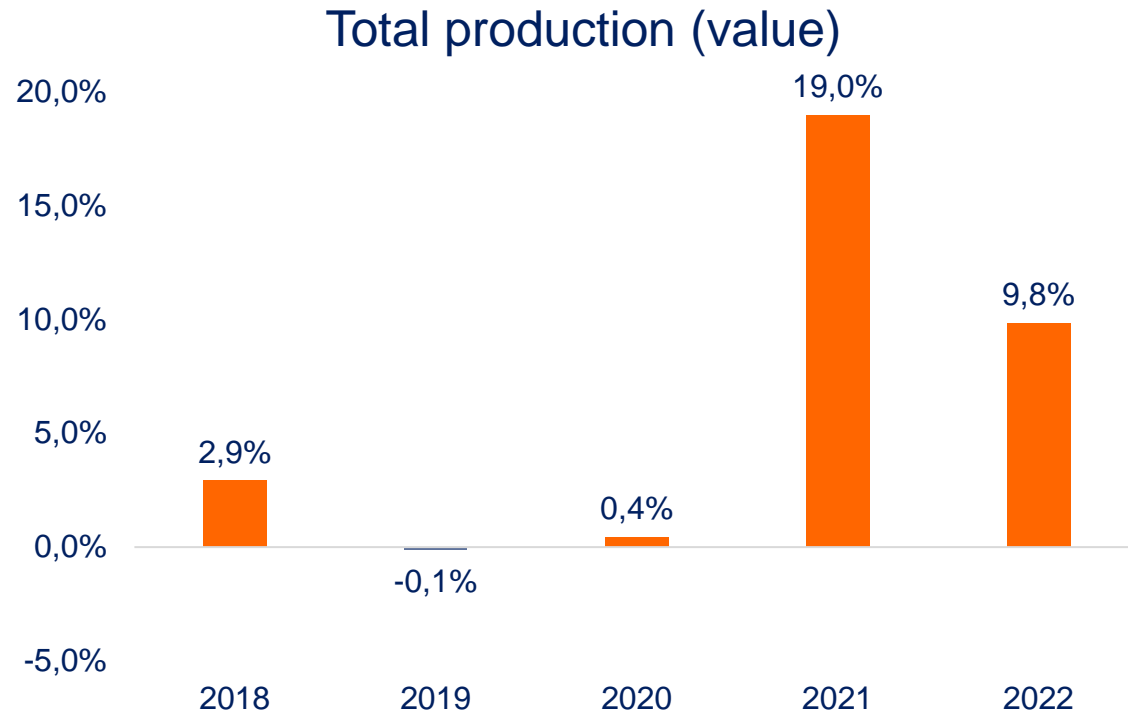
### Type of innovation (% of total innovations)

- |   |
|---|
| 1 <sup>st</sup> Mechanization 27.9%                         |
| 2 <sup>nd</sup> planting and sowing 11.6%                   |
| 3 <sup>rd</sup> Soil tillage 8.8%                           |
| 4 <sup>th</sup> Irrigation 8.3%                             |
| 5 <sup>th</sup> Structure and use of buildings 6.7%         |
| 6 <sup>th</sup> Phytosanitary fight 5.3%                    |
| 7 <sup>th</sup> Fertilization 4.9%                          |
| 8 <sup>th</sup> Variety, breeds, clones 4.2%                |
| 9 <sup>th</sup> Organization and business management 3.8%   |
| 10 <sup>th</sup> Related activities 2.9%                    |
| 11 <sup>th</sup> Sales and marketing 2.8%                   |
| 12 <sup>th</sup> Livestock housing 2.7%                     |
| 13 <sup>th</sup> Scaffolding and pruning of arboretums 2.3% |
| 14 <sup>th</sup> Animal nutrition 1.9%                      |
| 15 <sup>th</sup> Milking 1,4%                               |
| 16 <sup>th</sup> Orchard management 0.9%                    |
| Other 3.5%  |

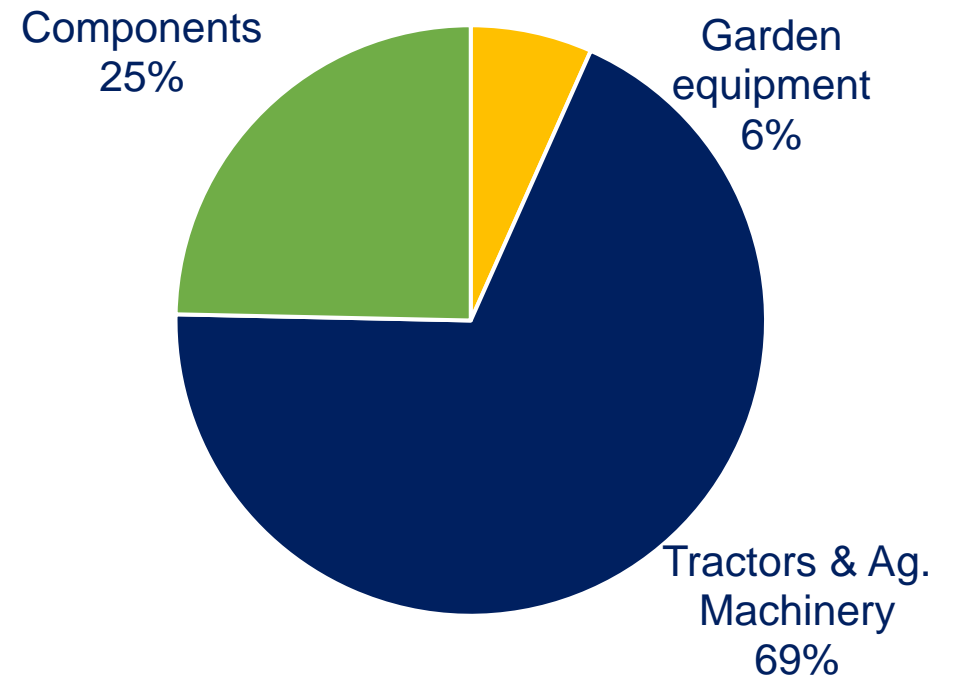


# TOTAL PRODUCTION - 2021

↑ Up in value  
↓ Down in quantity



**Production:**  
**15 mld**  
**+10%**



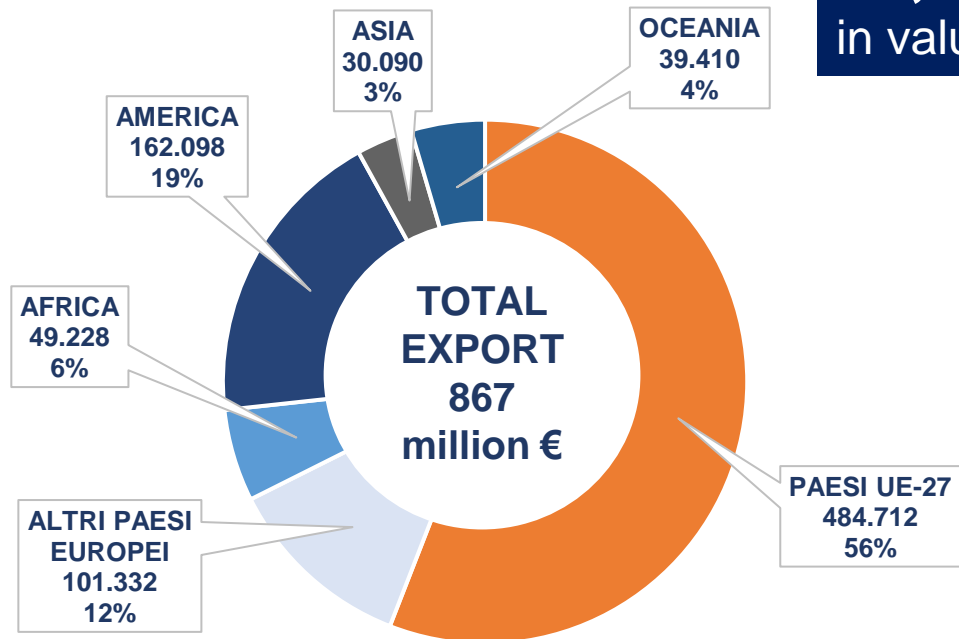
Source: Ufficio Studi e Statistiche FederUnacoma, stime sulla base dei prezzi al pubblico, IVA esclusa



## EXPORTS 2022 (JANUARY-JUNE)

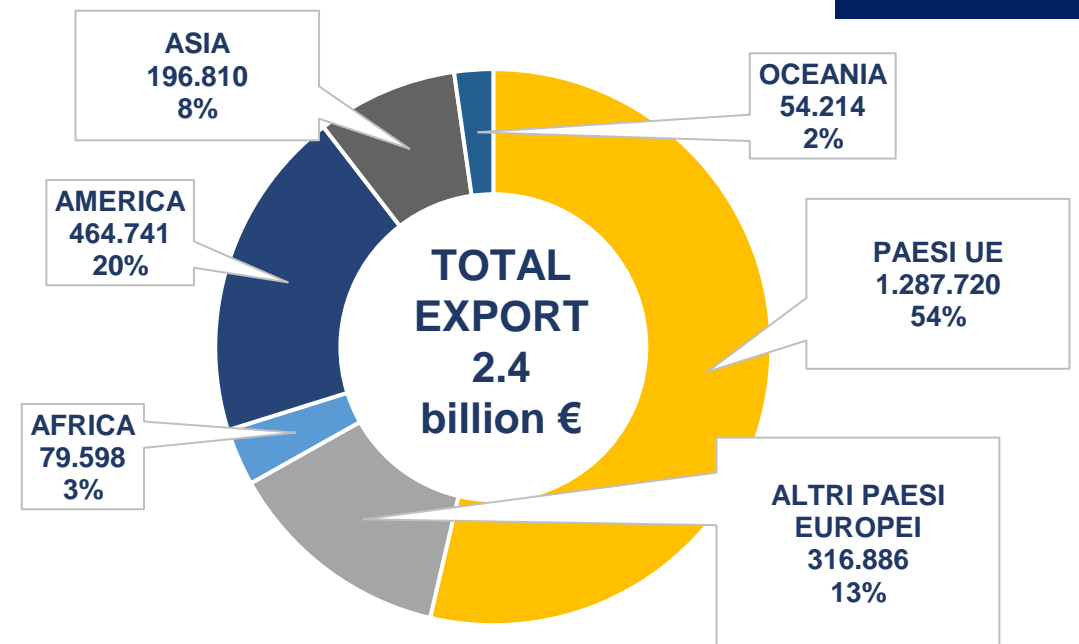
### TRACTORS

**+2,4%**  
in value



### AG. MACHINERY

**+ 15,0%**  
in value

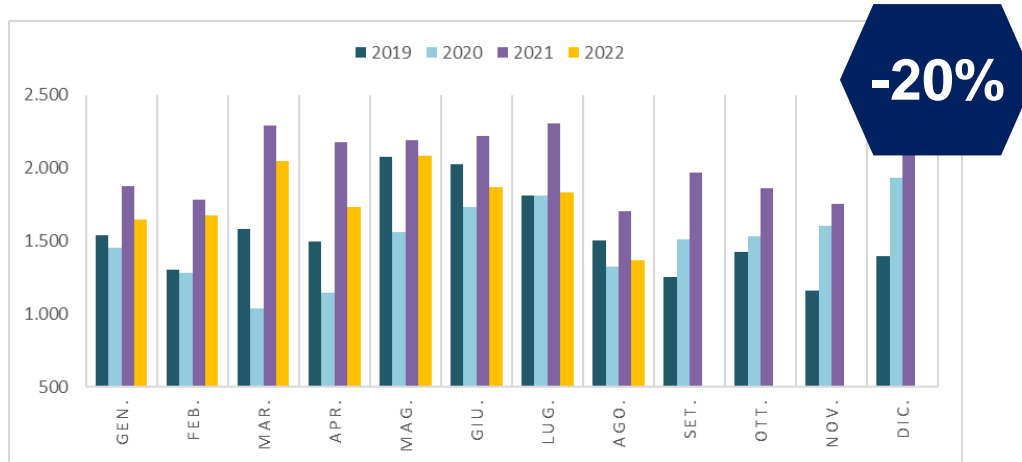




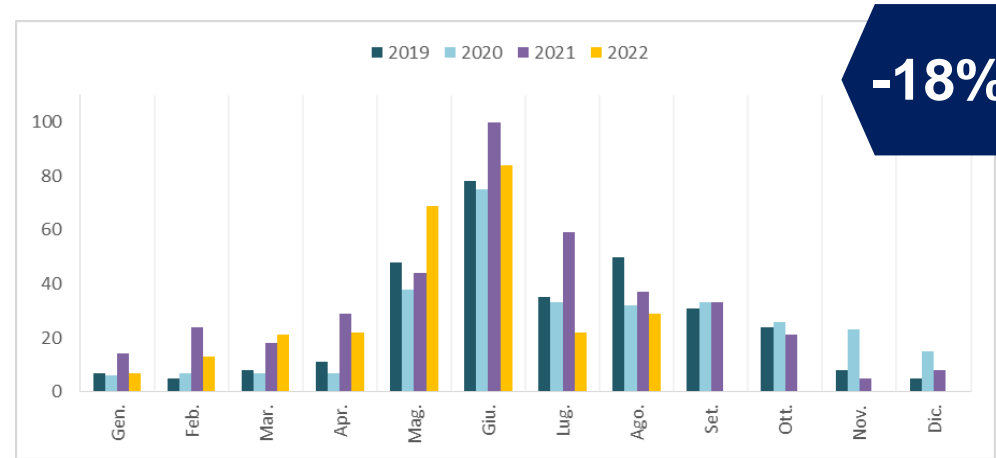


# REGISTRATIONS 2022 (JANUARY-AUGUST)

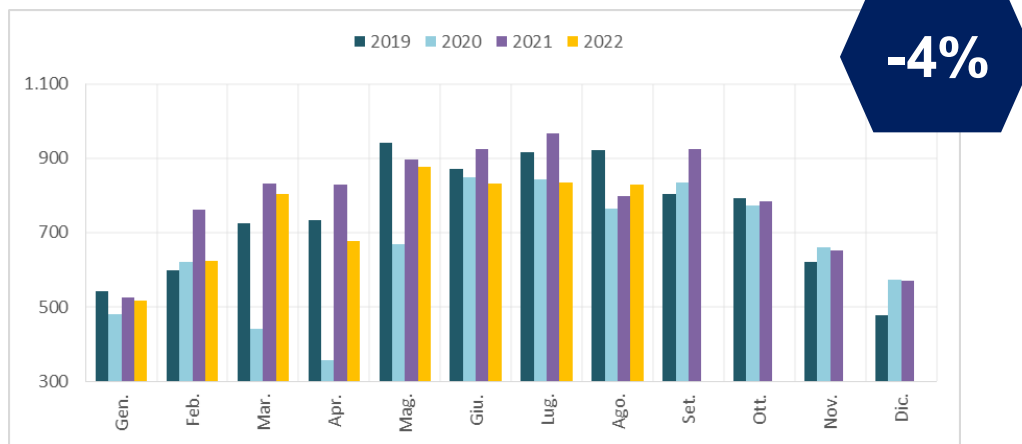
## TRACTORS



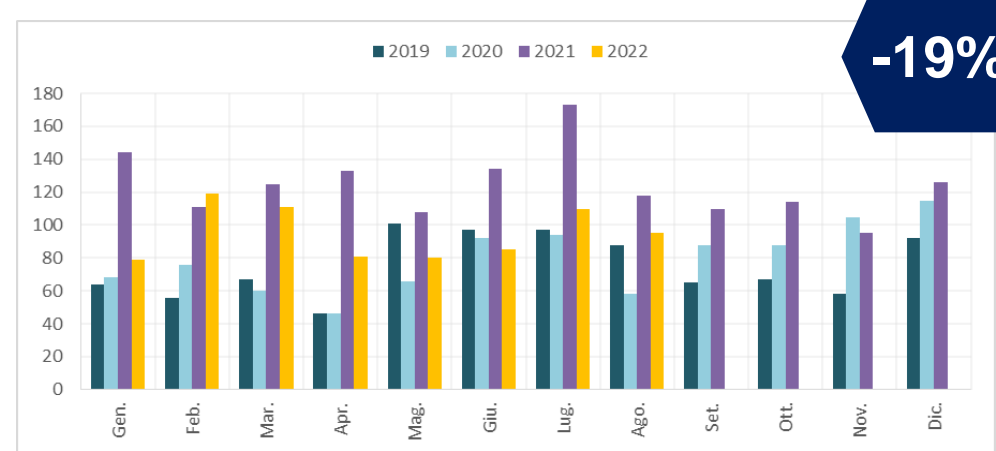
## COMBINES

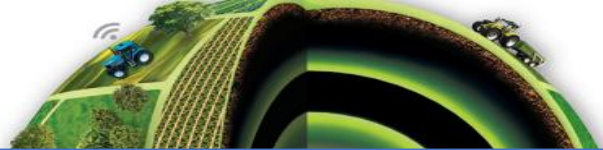


## TRAILERS



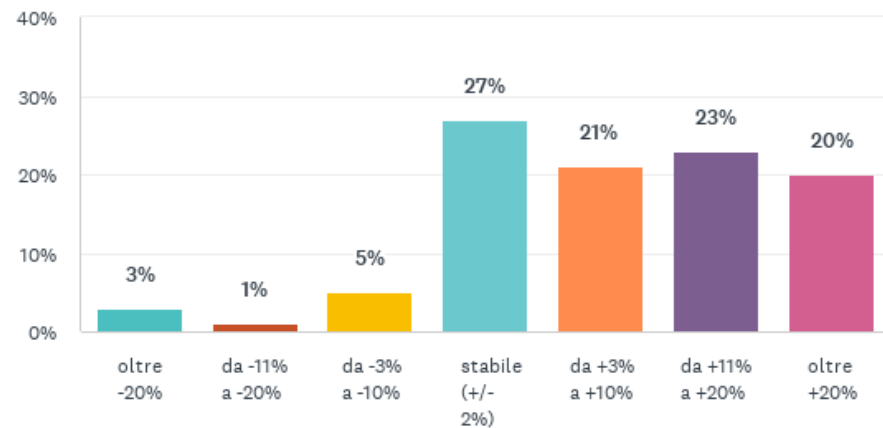
## TELEHANDLERS



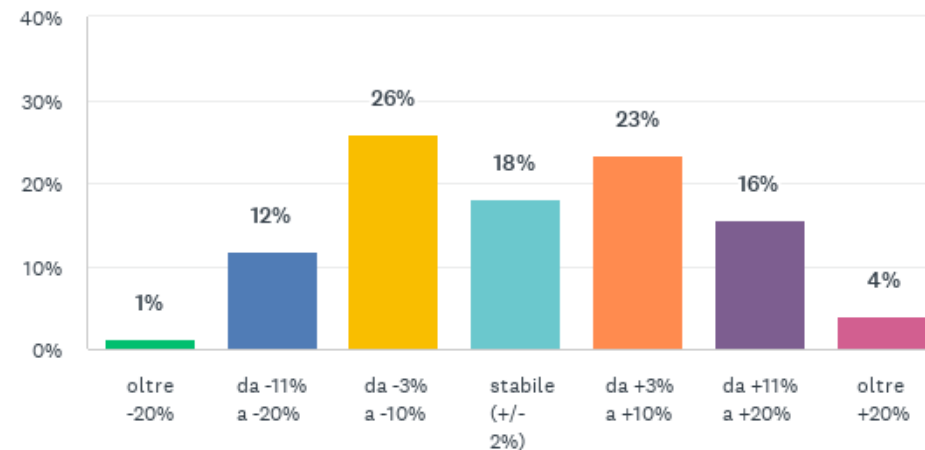


# OUTLOOK FOR THE NEXT SIX MONTHS

## At the end of 2021



## September 2022





Demand is still high and sales could be higher but there are still :

- supply chain issues
- high prices of raw material
- delivery times longer than normal
- weather conditions were not favorable for the most part of the year
- high inflation rate

