



ROSSPETSMAASH

Russian Association of
Specialized Machinery and
Equipment Manufacturers

Agrievolution Country Report: Russian Federation



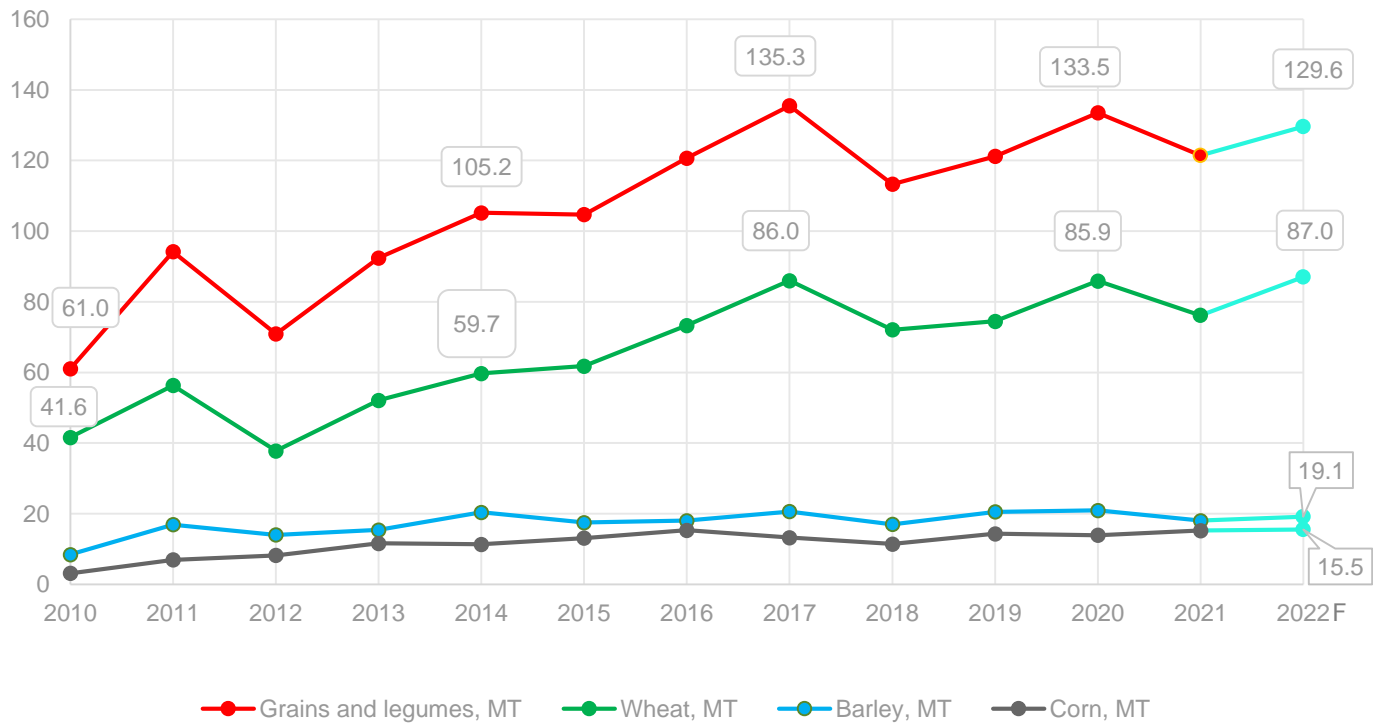
June 2022



2022: Forecasted production of grain 130 MT, wheat 87 MT



Gross harvest dynamics



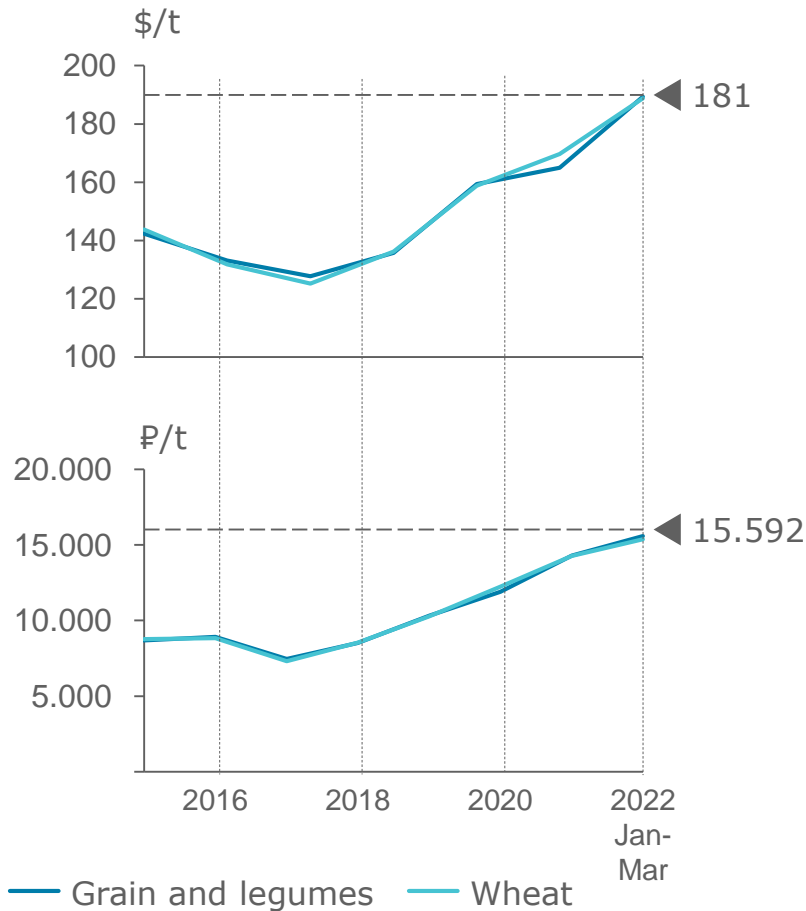
Source: Ministry of Agriculture of the Russian Federation, Rosstat



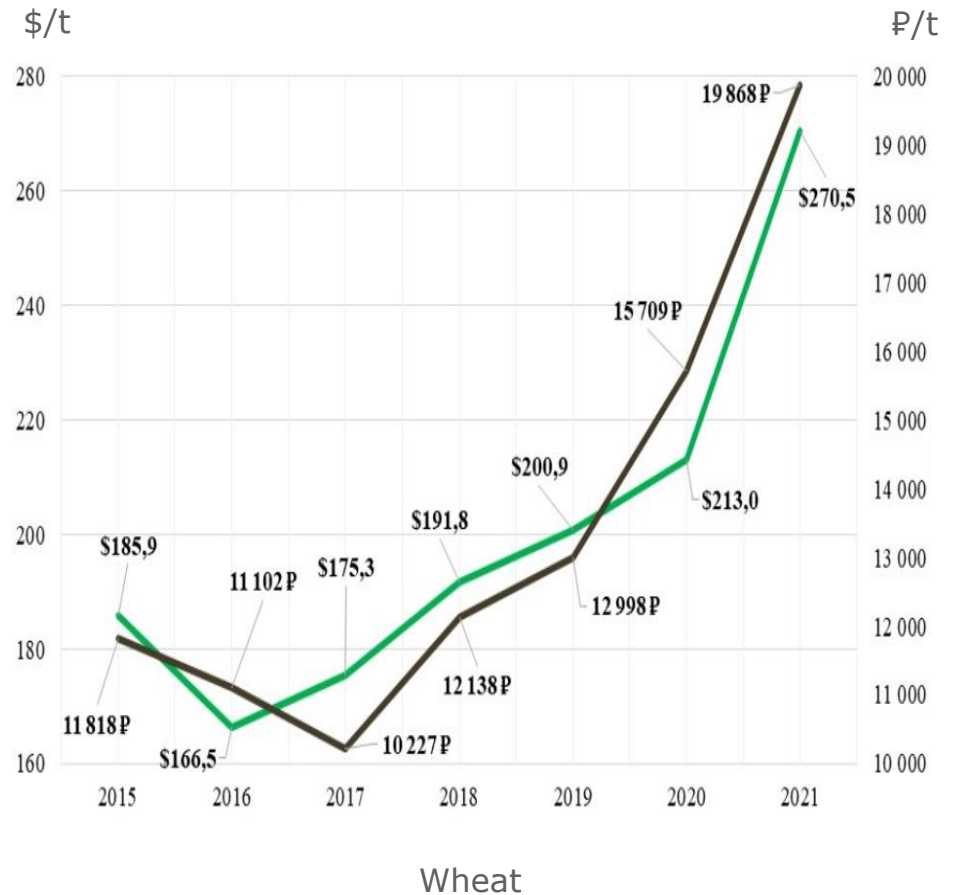
2022: Growth of prices



Average domestic prices



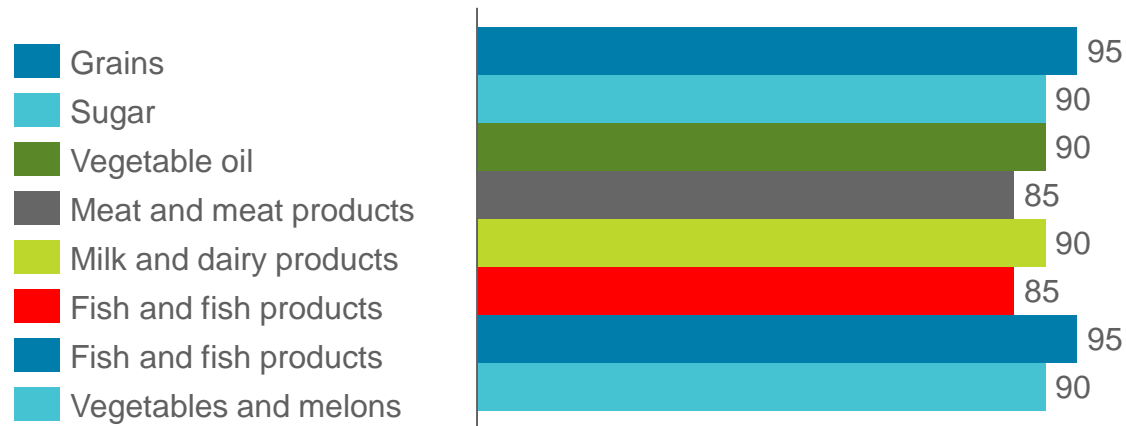
Average export prices



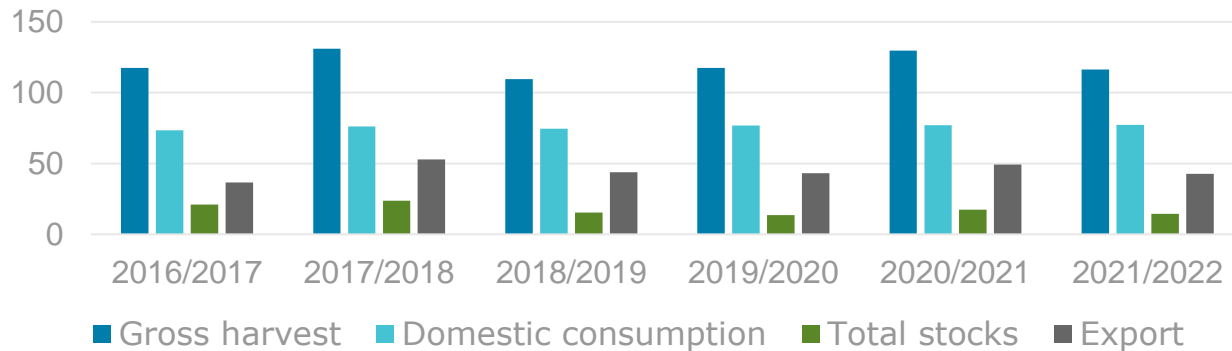


2022: Russia has sufficient grain export potential

Indicators of food independence, %



Grains, MT



Source: The Doctrine of food security of the Russian Federation, statista.com



2022: Machinery sector reconfiguration



1. Ministry of Industry and Trade of Russia
2. Ministry of Agriculture of Russia
3. Russian Export Center
4. Rosagroleasing
5. Rosspetsmash

Development based on sound economic policies

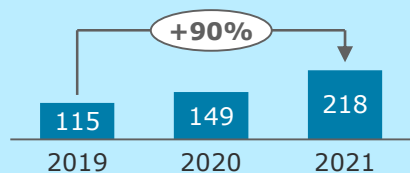
- Incentive tax policy
- Soft monetary policy
- Reasonable protectionism



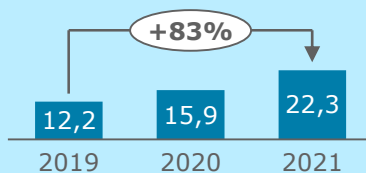
2022: Share of Russian equipment on the domestic market increased by 16 pp in 4 months

Annual indicators

Production, bn₽

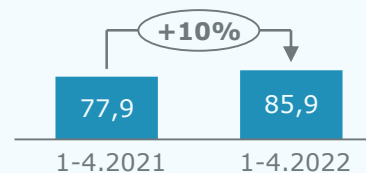


Export, bn₽

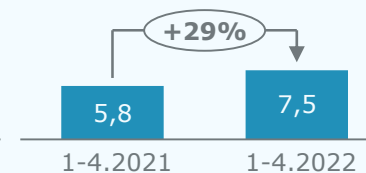


Indicators for 4 months

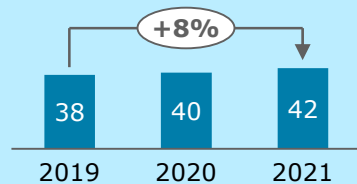
Production, bn₽



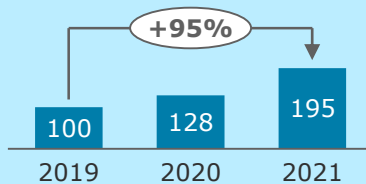
Export, bn₽



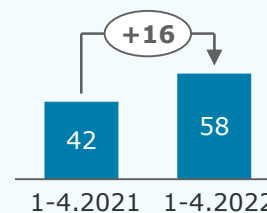
Number of employees, th



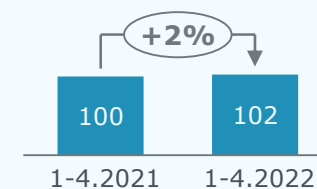
Market Annual Index (base year 2019)



Share, %



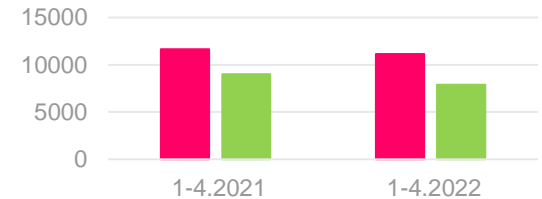
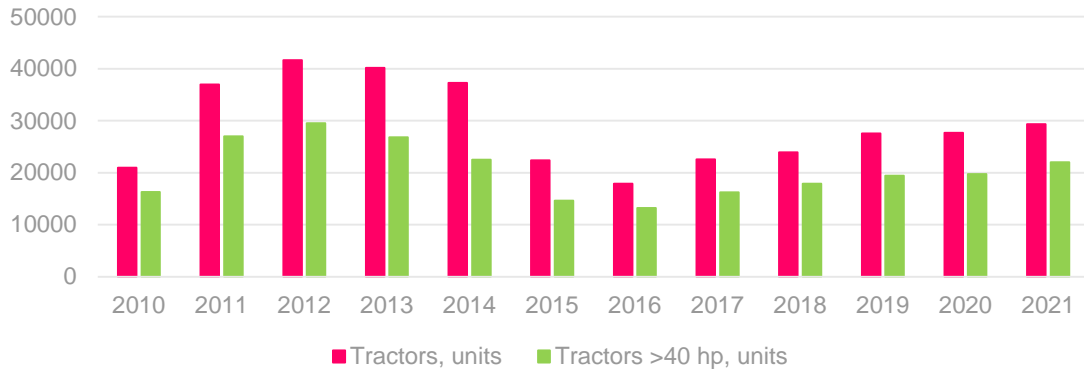
Market Index



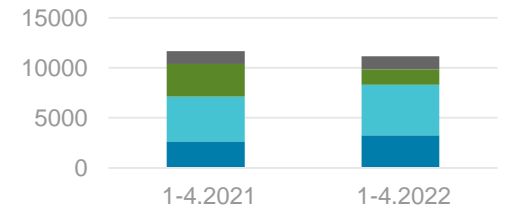
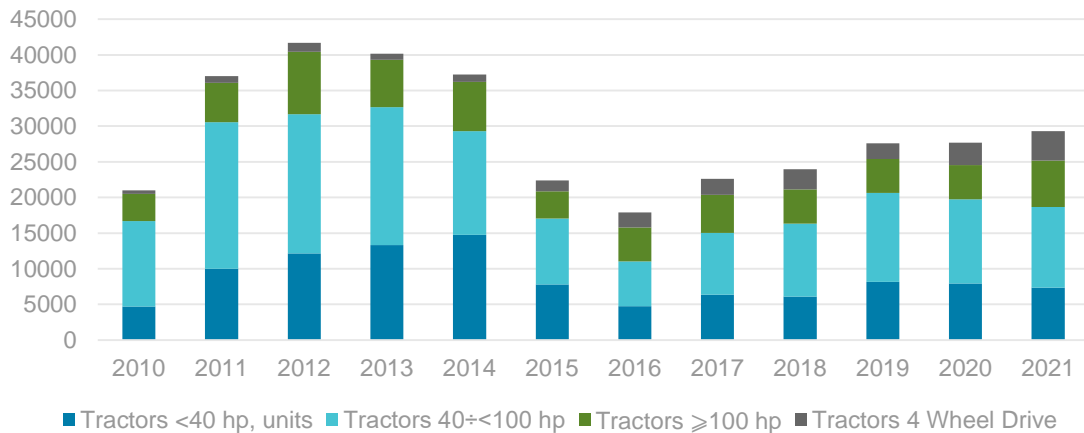


2022: Ag tractor market declined by 4,3% in 4 months

Domestic tractor market, units



Domestic tractor market by hp sectors, units

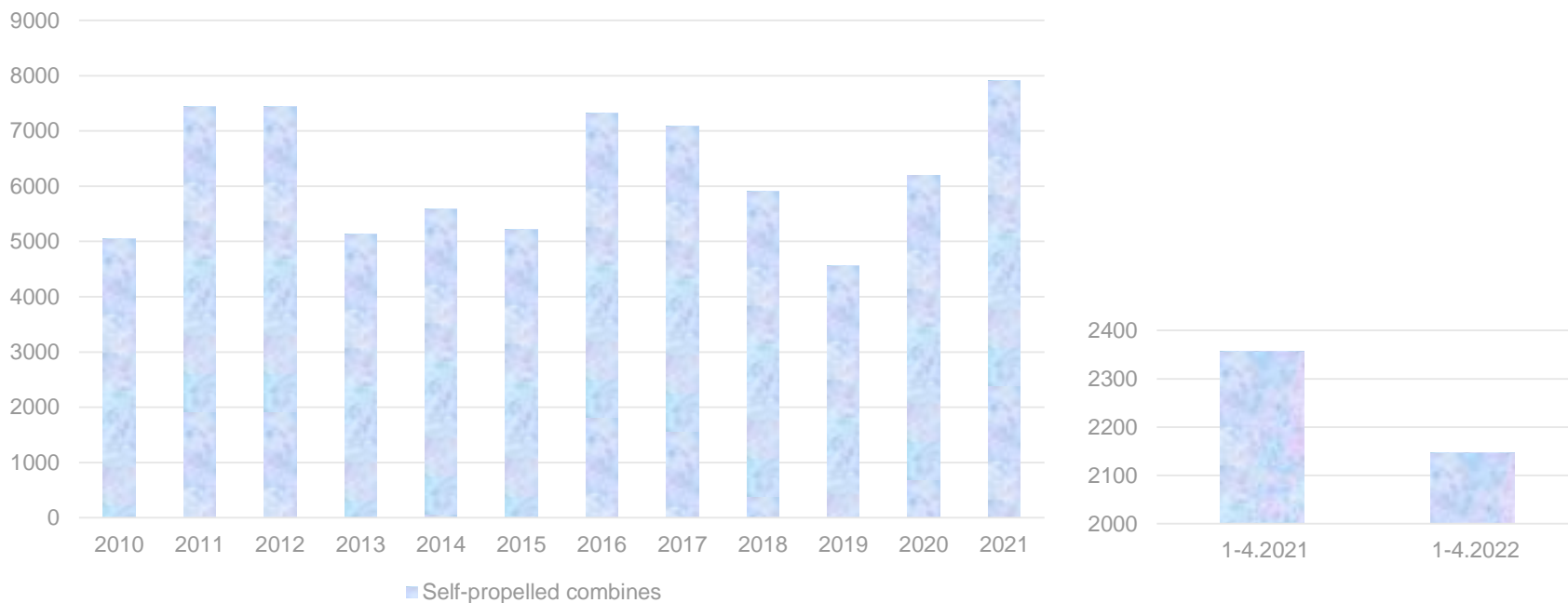


Source: Rosspetsmash-stat, FCS of Russia, Systematics



2022: Self-propelled combine market declined by 8,9% in 4 months

Domestic self-propelled combines market, units



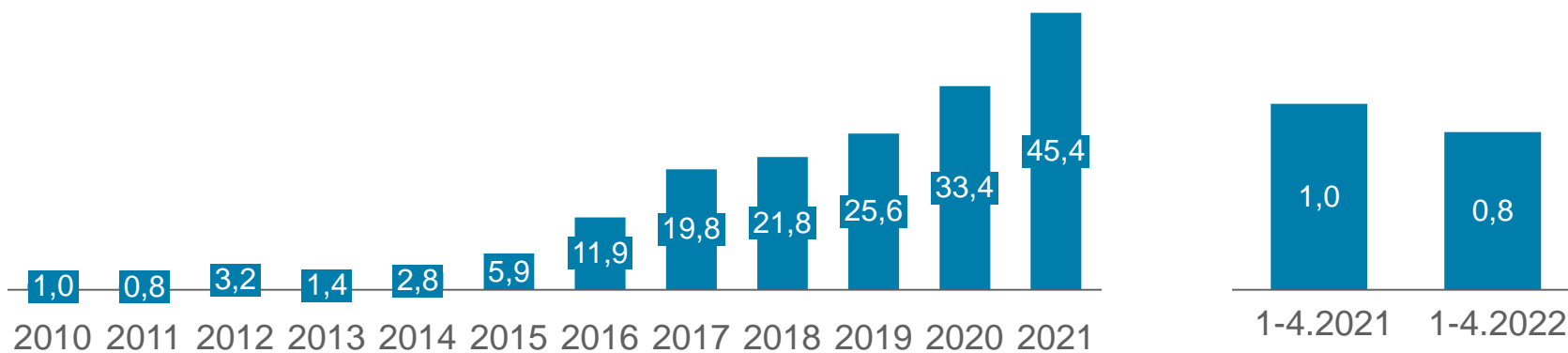
Source: Rosspetsmash-stat, FCS of Russia, Systematics



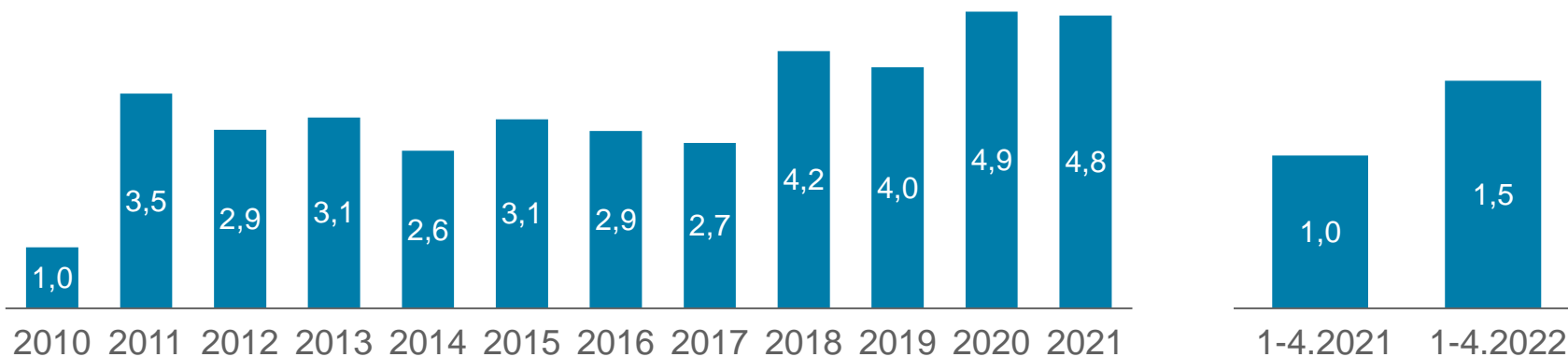
Export: Export index of Ag tractors and self-propelled combines

2022: The growth of combine harvesters exports

Export index of powerful Ag tractors



Export index of self-propelled combines



Source: Rosspetsmash-stat



2022: Time of opportunities

Positive

- High grain prices;
- State support measures;
- Development of component production;
- Building new logistics chains.

Negative

- Component deliveries: delays in terms and refusals of deliveries under concluded and paid contracts;
- Disruption of supply chains;
- Expensive loans for industrialists and agricultural producers.



2021: Preliminary results and expectations

- Preliminary results: Not everything is as bad as it could be
- Expectations: Reaching the pre-crisis level in the main sectors in 2023



THANK YOU FOR YOUR ATTENTION!