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CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA

# **ARGENTINIAN CHAMBER OF AGRIMACHINERY MANUFACTURERS**

**AGRIEVOLUTION REPORT – APRIL 2023**

# ARGENTINIAN AGRIMACHINERY INDUSTRY

## FIRST APPROACHES



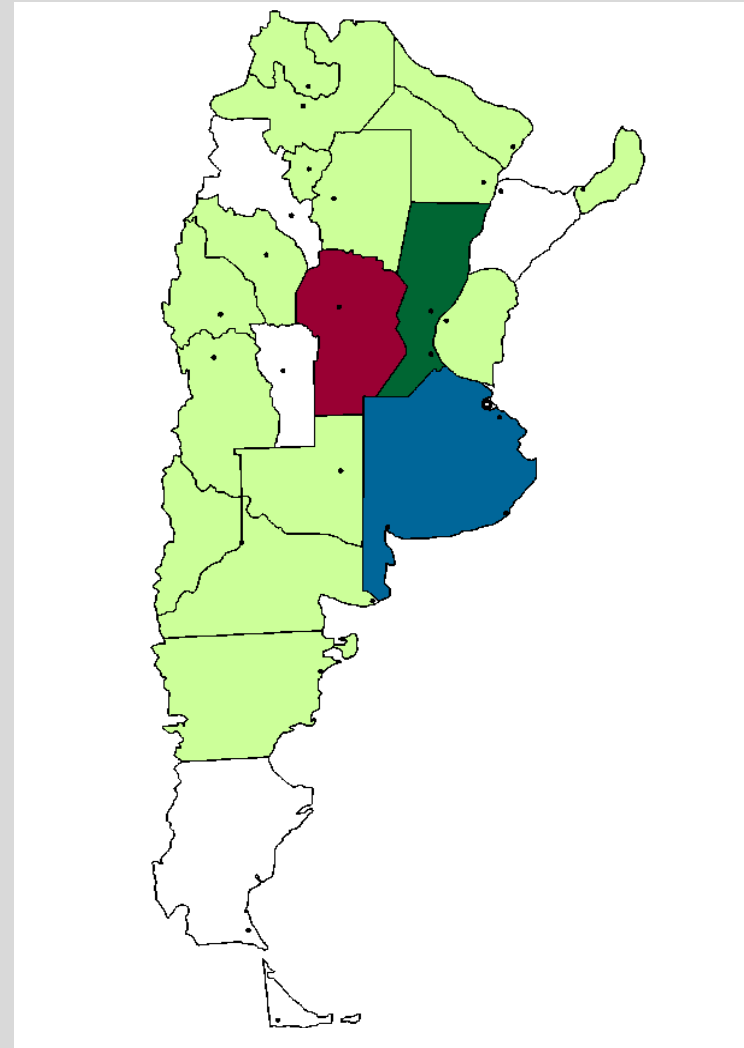
- **1260 companies**
- **51% assembly companies and 49% spare parts.**
- **38,000 direct employments**
- **97% local companies**
- **86% family-owned companies**
- **23% regularly export**
- **25 export destination**
- **88% companies have fewer than 50 employees.**




# ARGENTINIAN AGRIMACHINERY INDUSTRY

## GEOGRAPHICAL DISTRIBUTION



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



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# ARGENTINIAN AGRICULTURE

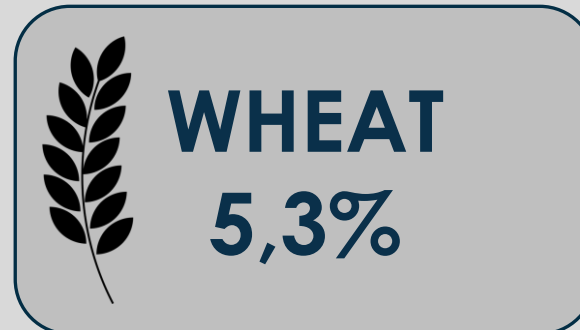
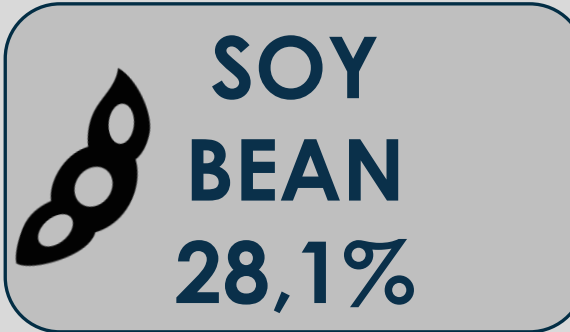
## MAIN CROPS

# ARGENTINIAN AGRICULTURE

MAIN CROPS - Percentage of participation in total exports 2022



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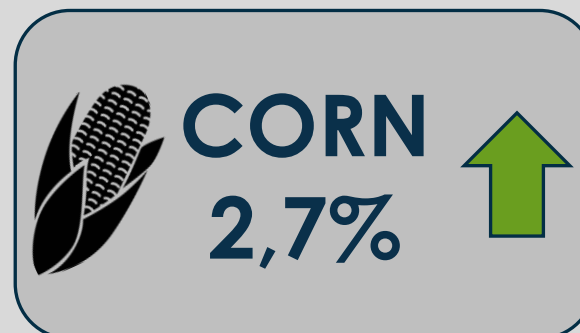
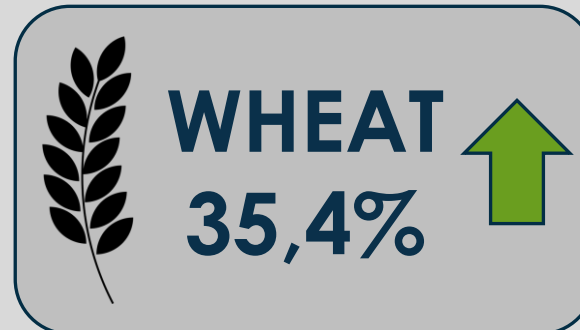
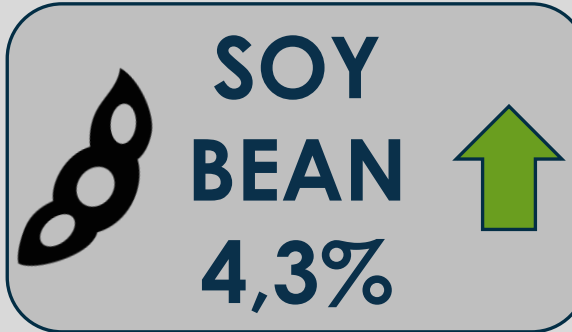


# ARGENTINIAN AGRICULTURE

MAIN CROPS – Exports variation comparing 2021



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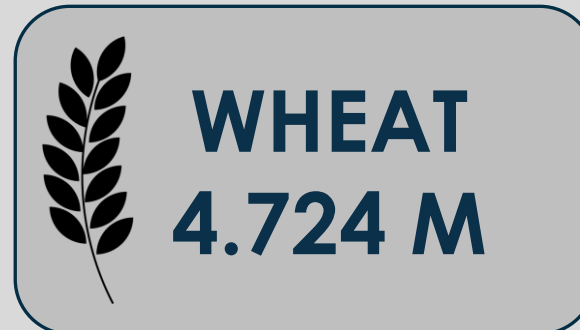
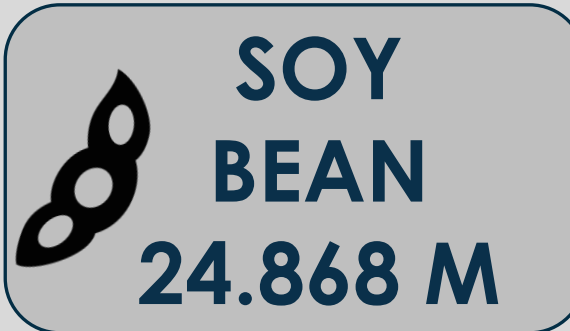


# ARGENTINIAN AGRICULTURE

MAIN CROPS – Total exports in million dollars – 2022



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# 2022/2023 CAMPAIGN

MAIN PRODUCTS – 2021/2022 Comparison



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## SOY BEAN

	2021/22 Campaign	2022/23 Campaign
Sown	16,3 Mha	↓ 16,0 Mha
Yield	27,9 qq/ha	↓ 18,6 qq/ha
Total Production	42,2 Mt	↓ 23,0 Mt*




# 2022/2023 CAMPAIGN

MAIN PRODUCTS – 2021/2022 Comparison



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## WHEAT


	2021/11 Campaing	2022/23 Campaing
Sown	6,6 Mha	↓ 5,9Mha
Yield	35,0 qq/ha	↓ 23,3 qq/ha
Total Prod	23,0 Mt	↓ 11,5 Mt

# 2022/2023 CAMPAIGN

MAIN PRODUCTS – 2021/2022 Comparison



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CORN		
	2021/22 Campaigning	2022/23 Campaigning
Sown	7,7 Mha	↑ 7,9 Mha
Yield	69,9 qq/ha	↓ 39,0 qq/ha
Total Prod	51,1 Mt	↓ 32,0 Mt*

# PRODUCTION EVOLUTION

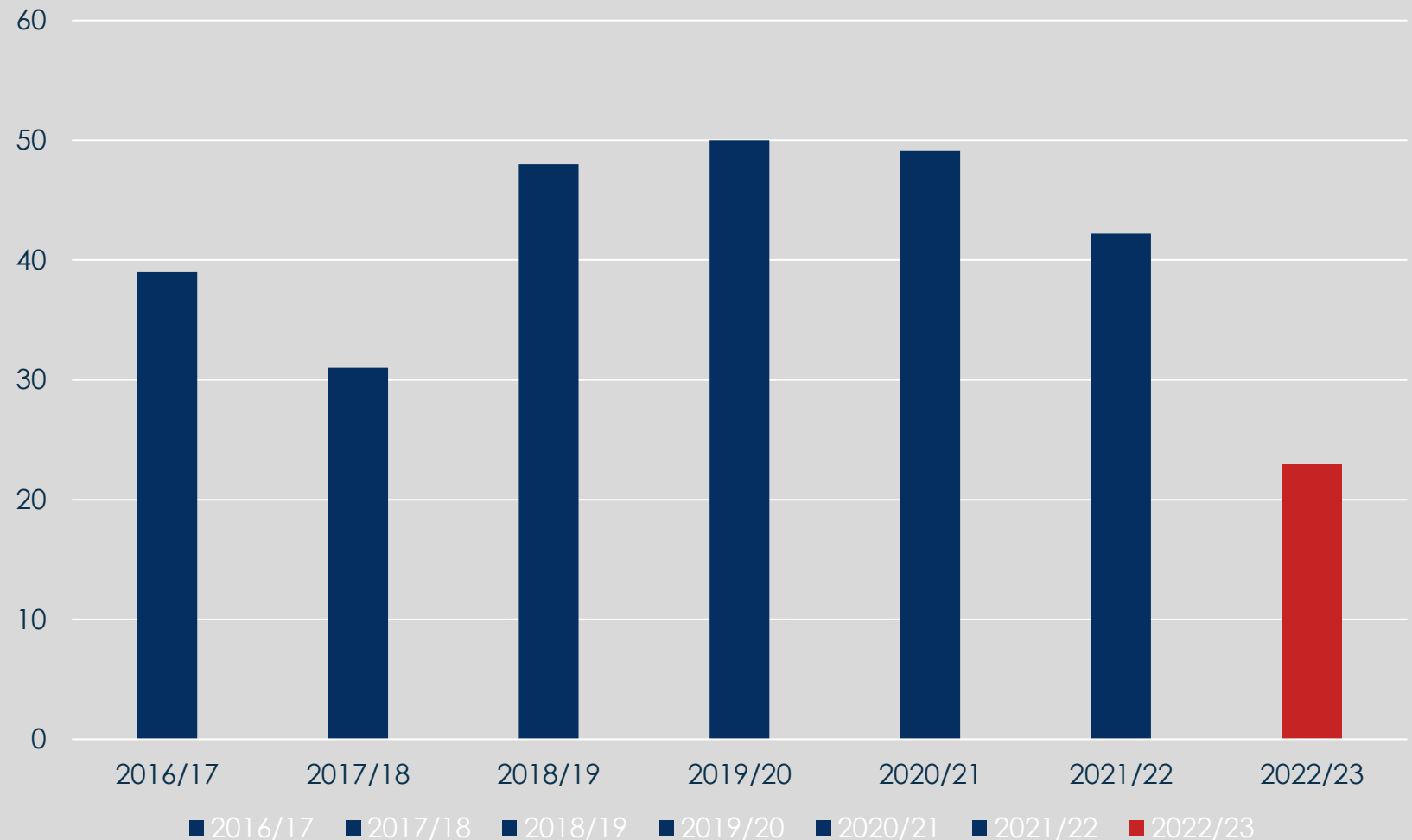
SOY BEAN – 2016/2022



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Production (MTn)



# PRODUCTION EVOLUTION

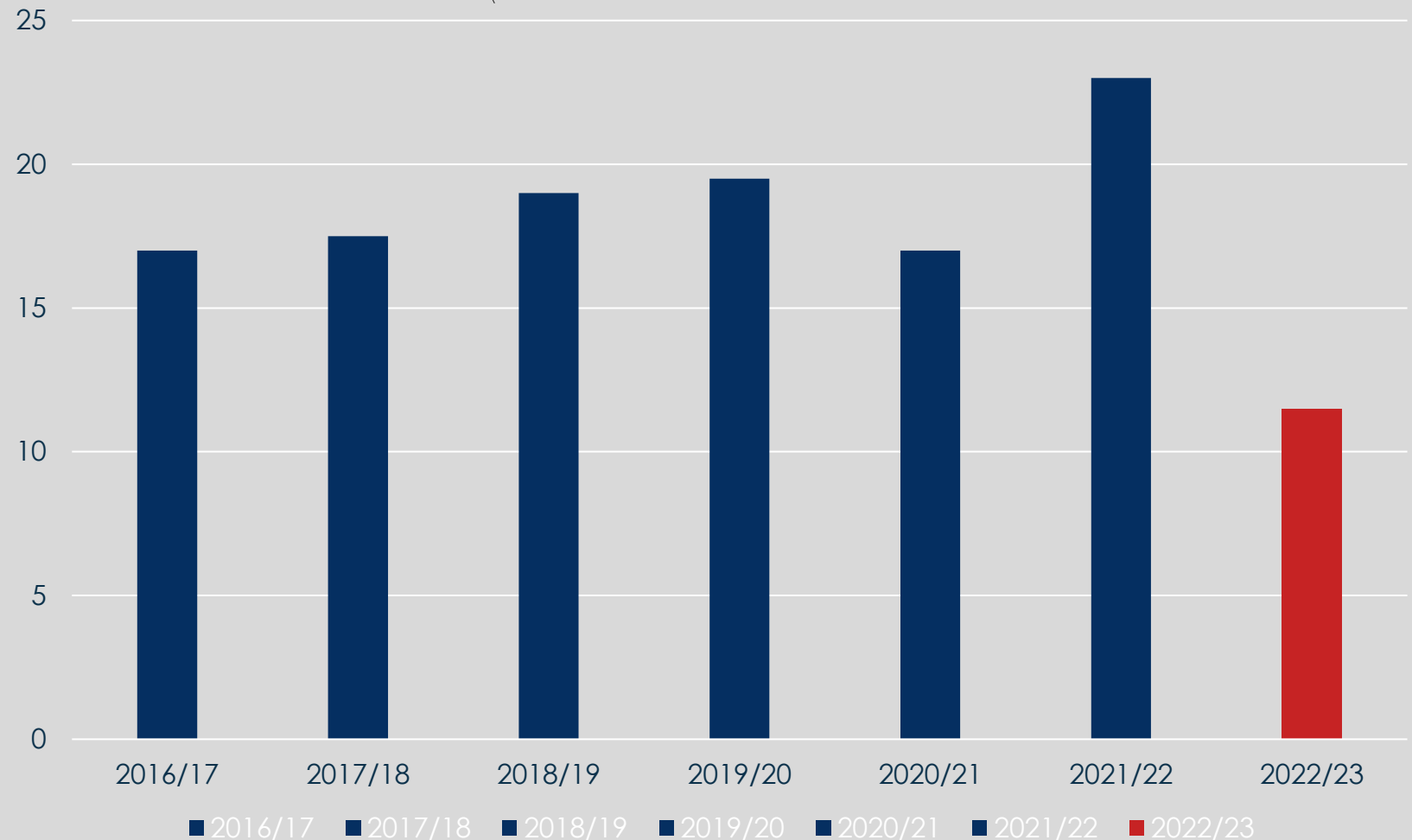
WHEAT – 2016/2022



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Production (MTn)



# PRODUCTION EVOLUTION

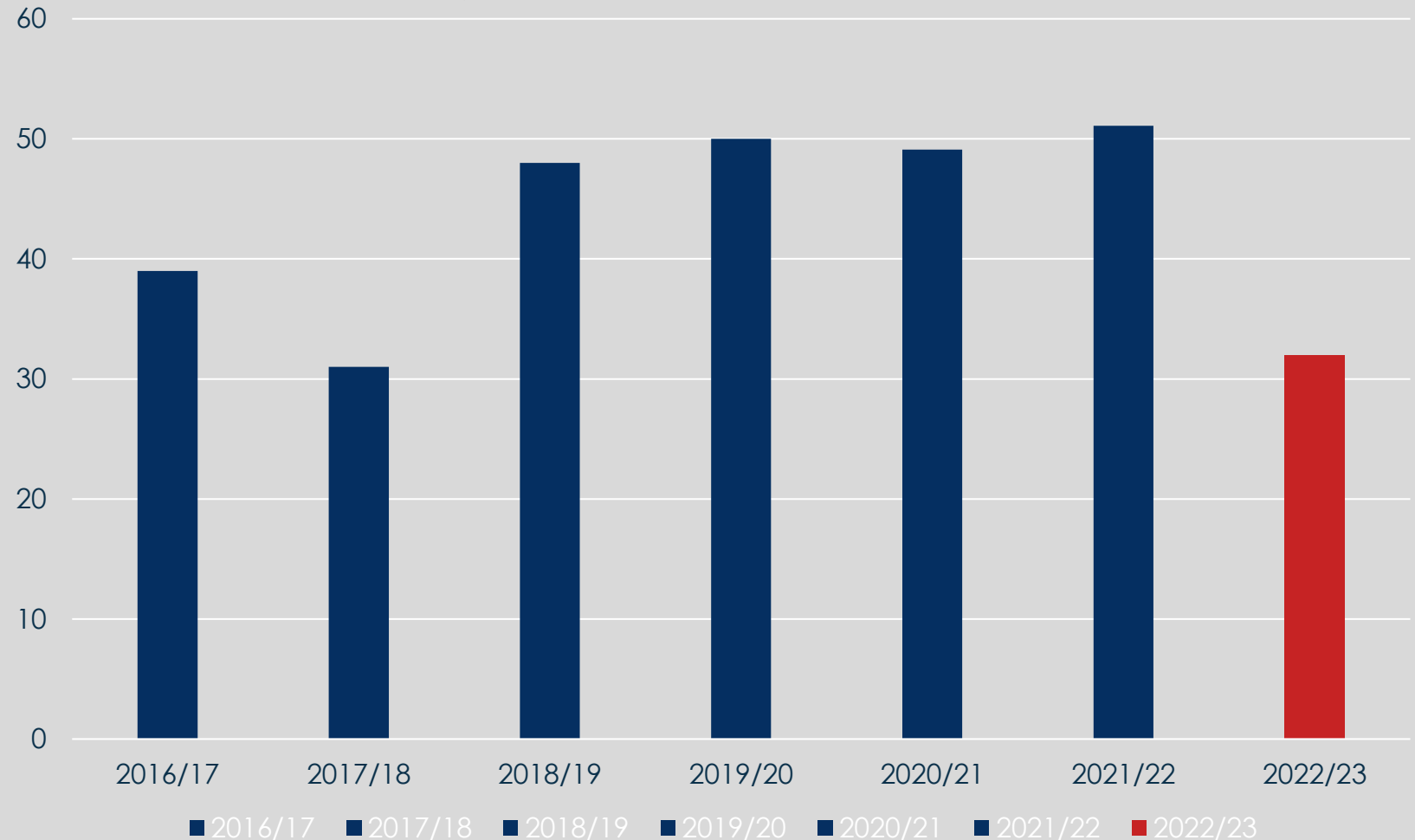
CORN – 2016/2022



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Production (MTn)



Source: Bolsa de Comercio de Rosario



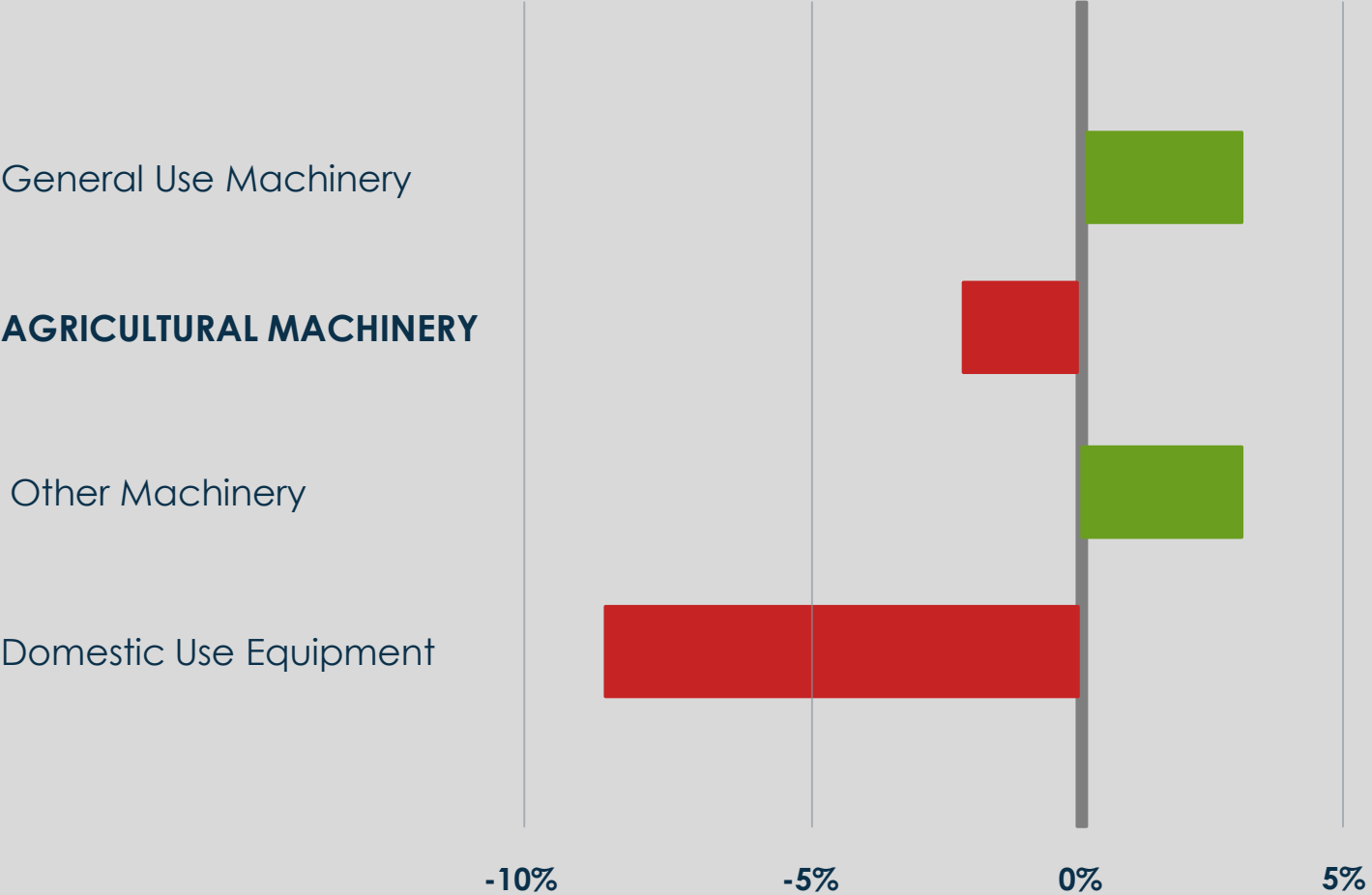
# ARGENTINIAN AGRIMACHINERY MARKET

# ARGENTINIAN MACHINERY INDUSTRY

Agrimachinery in Manufacturing Production Index  
February 2023



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Source: INDEC

Manufacturing Production Index is an indicator that measures the evolution of the sector monthly, using the following variables: 1) production in units. 2) Sales in units. 3) Use of inputs in units. 4) Apparent consumption in units. 5) Number of hours worked by staff. 6) Sales at current prices deflated.

# ARGENTINIAN AGRIMACHINERY MARKET 2022



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TOTAL SALES – In Units – 2021 Comparison

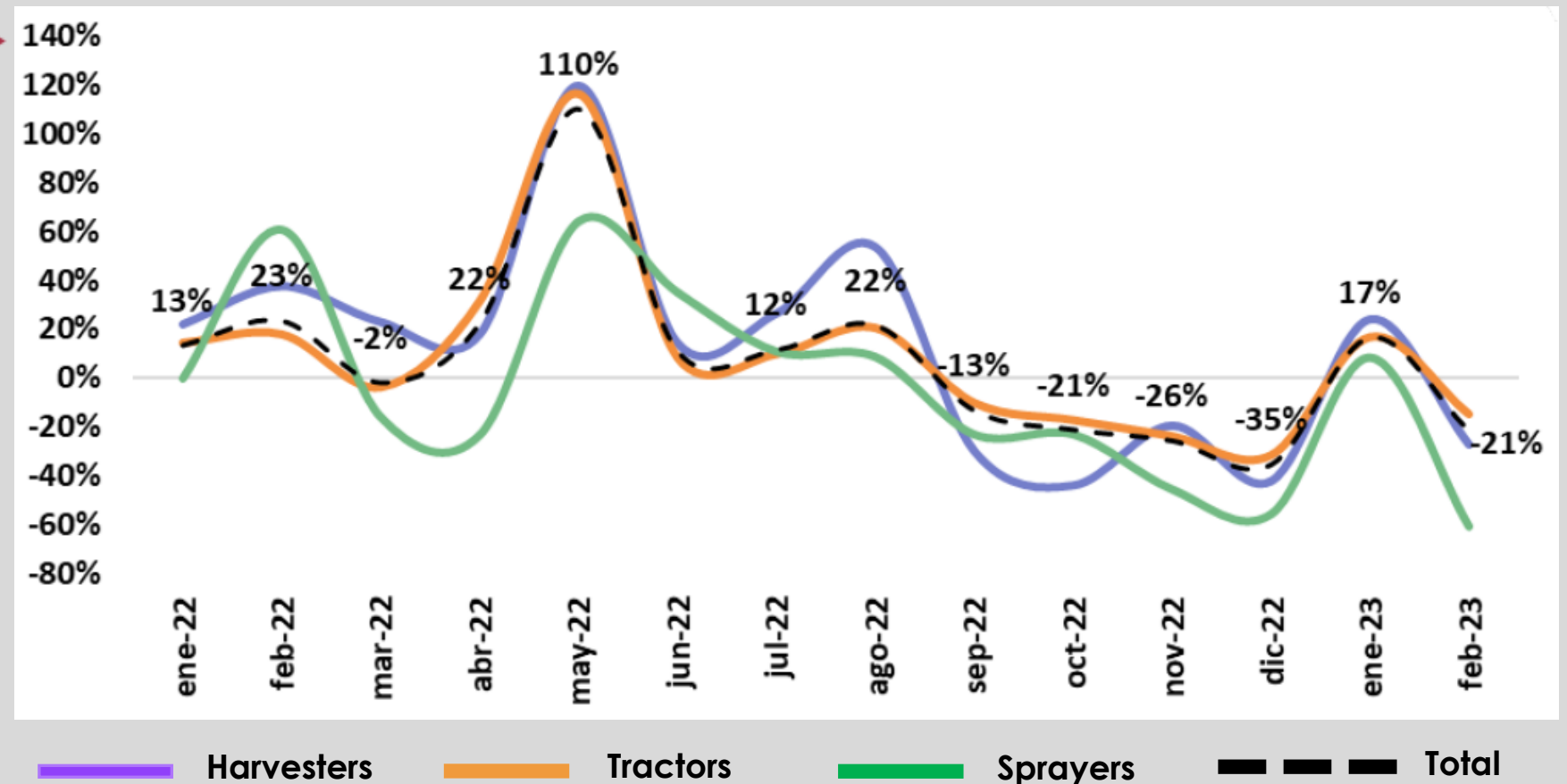
TOTAL SALES		
PRODUCT	2021	2022
Harvesters	852	↑ 1040
Tractors	7613	↑ 8761
Planters	2727	↓ 2426
Sprayers	1450	↓ 1334
Grain storage and hauling machinery	4549	↓ 3815



# ARGENTINIAN AGRIMACHINERY MARKET – 2023 TENDENCIES

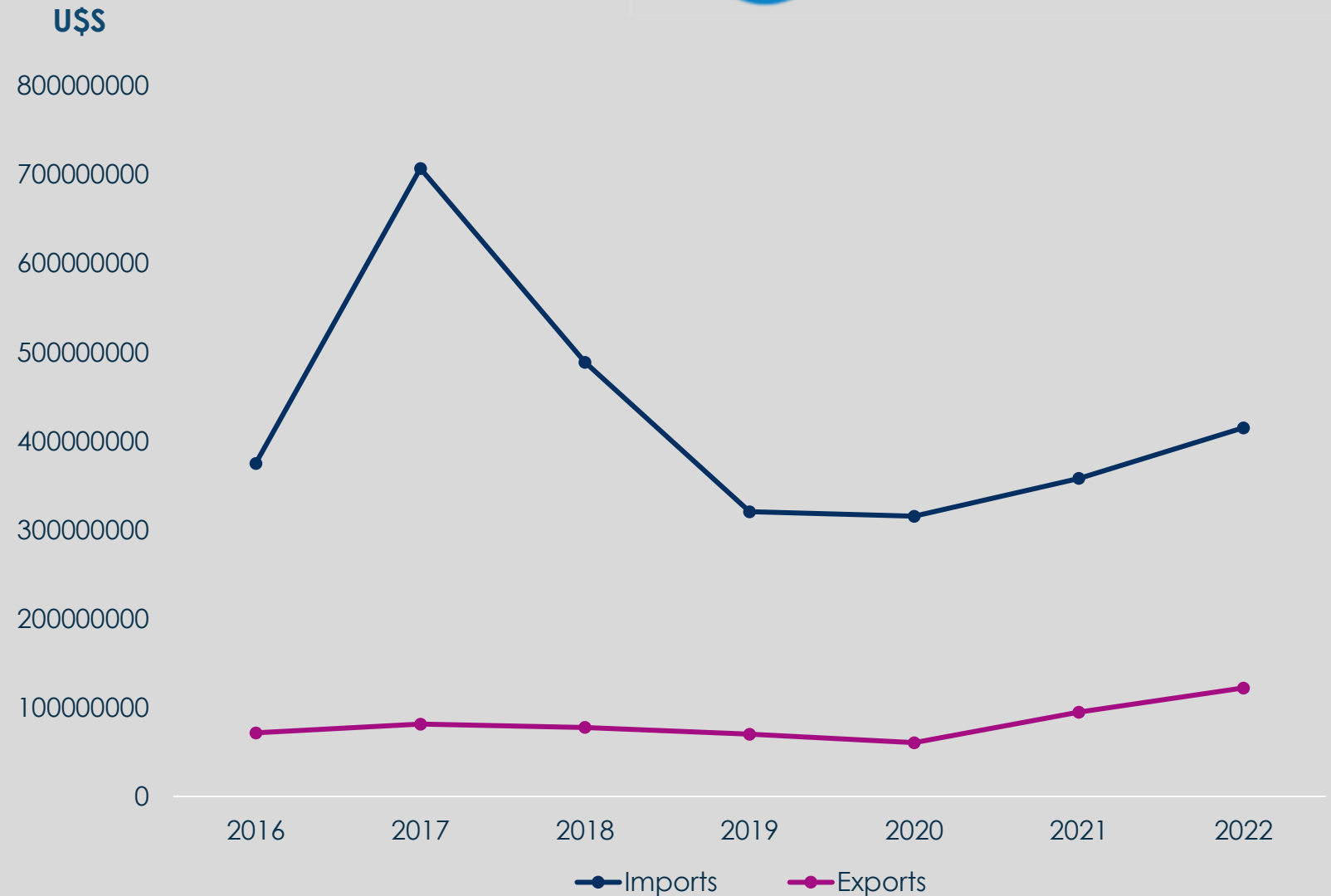


## AGRICULTURAL MACHINERY SALES Year-on-year percentage change



# IMPORTS - EXPORTS

EVOLUTION 2016 - 2022

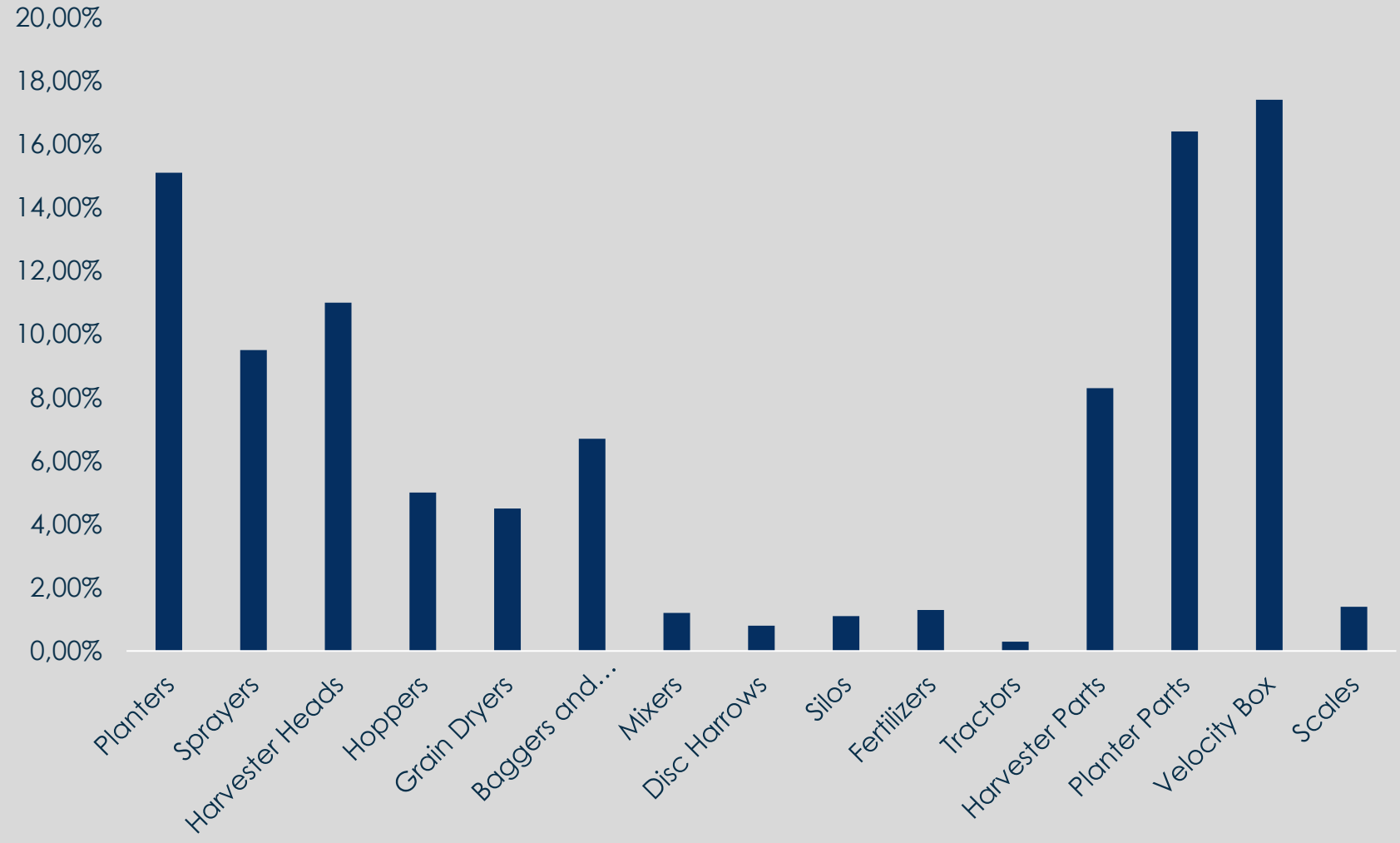


# EXPORTS

## PERCENTAJE DE PARTICIPACION BY ITEM, 2022



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# CONCLUSIONS

## Key Influencers - 2023



- **Good** overall activity for farmers and agrimachinery industries in 2022
- **Increase** in the percentage of the main crops in total exports
- **Drop** in activity since mid 2022
- One of the **worst droughts** in recent years severely damaged agricultural yields in 2022/2023 campaign
- Significant **drop** in the production of the main crops
- Strong **downward trend** in agricultural machinery sales
- High **dependence** on financial policy