

Agricultural Equipment in France in 2022

Agrievolution Country Report



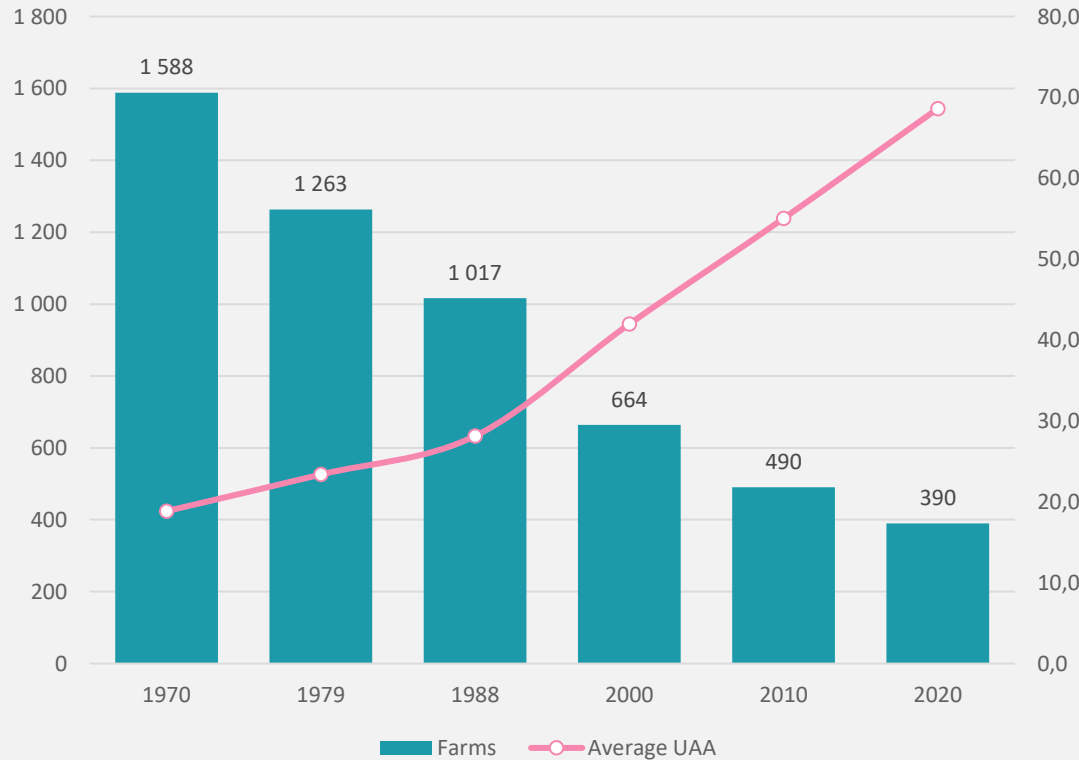
French agriculture

Farm demographics

100,000 fewer farms in France in 10 years: still fewer farms, but still larger



Changes in the number of farms and average UAA in metropolitan France



Units: thousand units and hectare
 Field: Metropolitan France, excluding structures managing collective pastures
 Source: Agreste - Agricultural censuses (final results)

The number of farms according to their technical-economic orientation from 2000 to 2020

Technical and economic orientations	Farms (number)			Evolution 2020/2010	Average annual growth 2020/2010
	2000	2010	2020		
Field crops	134 391	115 344	111 825	-3 519	-0,3%
Viticulture	92 304	70 019	59 032	-10 987	-1,7%
Beef cattle	77 556	62 590	48 398	-14 192	-2,5%
Mixed farming	134 965	57 984	40 594	-17 390	-3,5%
Sheep, goats, other herbivores	82 456	55 669	35 460	-20 209	-4,4%
Dairy cattle	74 584	48 058	35 029	-13 029	-3,1%
Pigs, poultry	13 104	29 080	18 658	-10 422	-4,3%
Horticulture, market gardening	15 784	14 063	15 347	1 284	0,9%
Fruits	25 305	21 374	15 285	-6 089	-3,3%
Mixed cattle	12 592	13 974	8 329	-5 645	-5,0%
Unclassified farms	766	1 822	1 822	0	0,0%
Set	663 807	489 977	389 779	-100 198	-2,3%

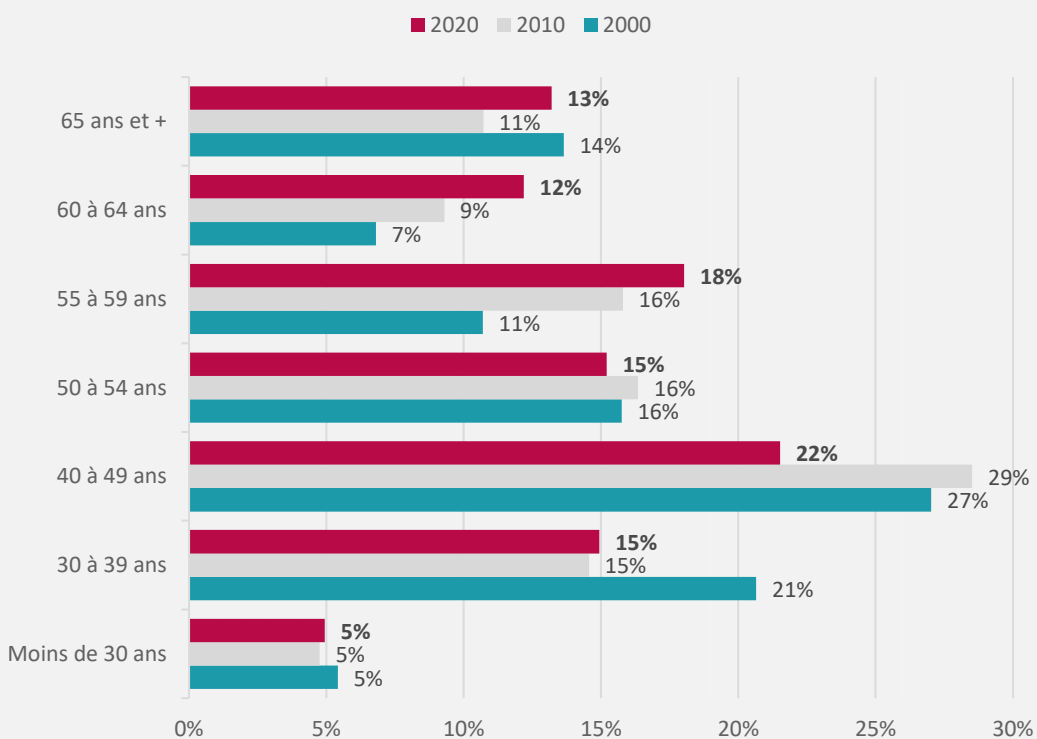
Unit: number of farms; %, average annual change
 Field: Metropolitan France, excluding structures managing collective pastures.
 Source: Agreste - Agricultural censuses (final results)

Demographics of farmers

Fewer and fewer farmers are getting older and older: 43% are likely to retire within ten years. The challenge of transmission is enormous!



Distribution of farmers by age group in 2000, 2010 and 2020



Unit: %, share of total farmers
 Field: Metropolitan France, excluding structures managing collective pastures
 Source: Agreste - Agricultural census

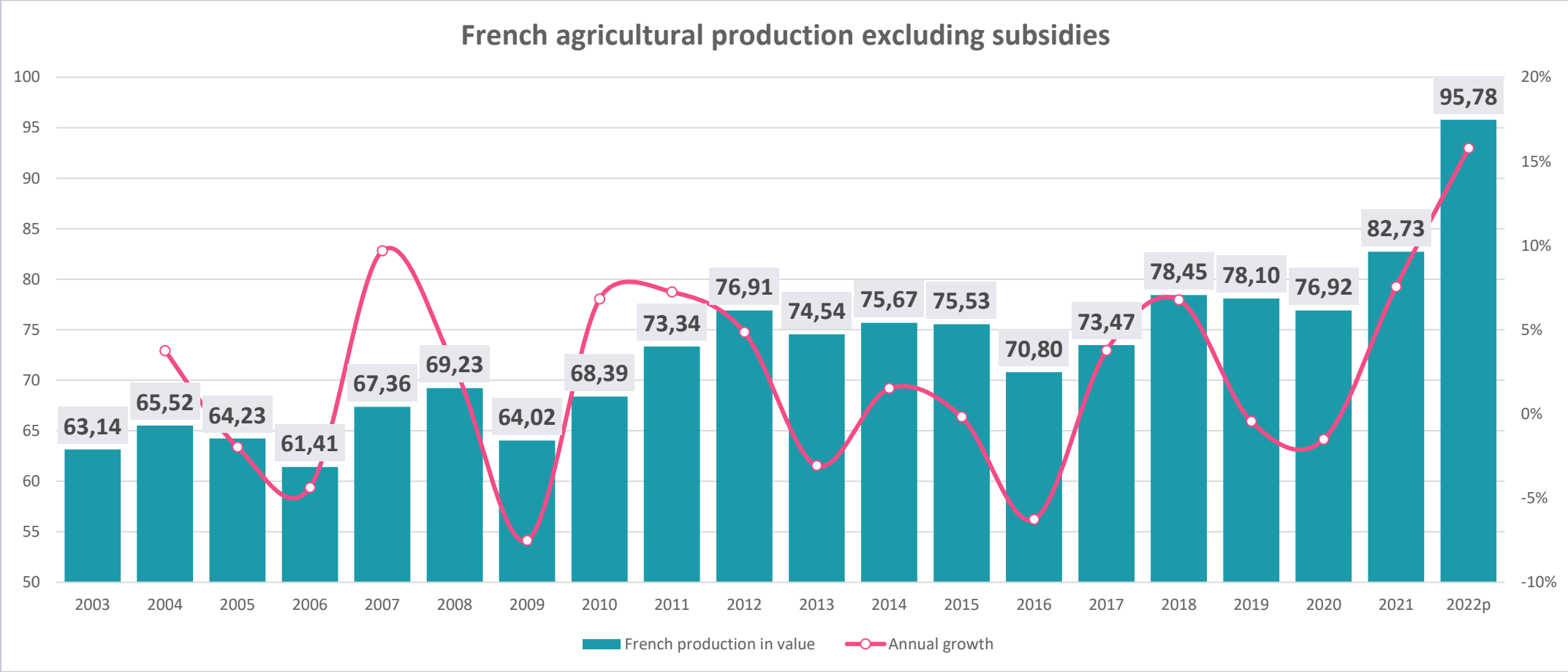
Farm managers and co-operators by age group

	2000	Share	2010	Share	2020	Share
- 30 years old	41 389	5%	28 732	5%	24 522	5%
30 to 39 years old	157 766	21%	87 932	15%	74 135	15%
40 to 49 years old	206 454	27%	172 213	29%	106 801	22%
50 to 54 years old	120 342	16%	98 759	16%	75 453	15%
55 to 59 years old	81 739	11%	95 401	16%	89 467	18%
60 to 64 years old	52 009	7%	56 140	9%	60 482	12%
65 years and over	104 254	14%	64 707	11%	65 505	13%
Total	763 953	100%	603 884	100%	496 365	100%

Units: number of farmers; %, share of total farmers
 Source: Agreste - Agricultural census

French agricultural production (2003-2022)

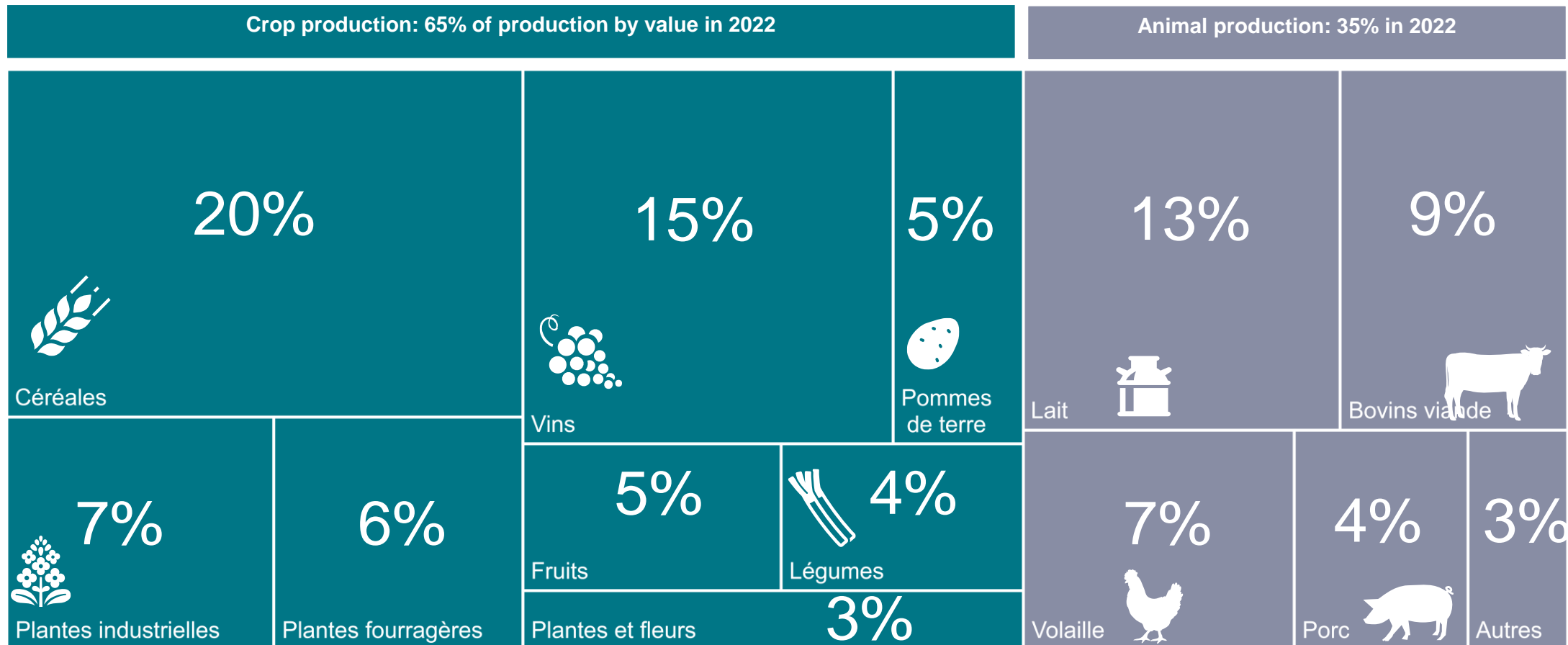
95.8 billion, up 15.8% year-on-year and 25% over two years



Units: billion euros (left scale); %, annual change in value (right scale)
 Source: INSEE, provisional agricultural account; (p) provisional data

The breakdown of French agricultural production by product in 2022

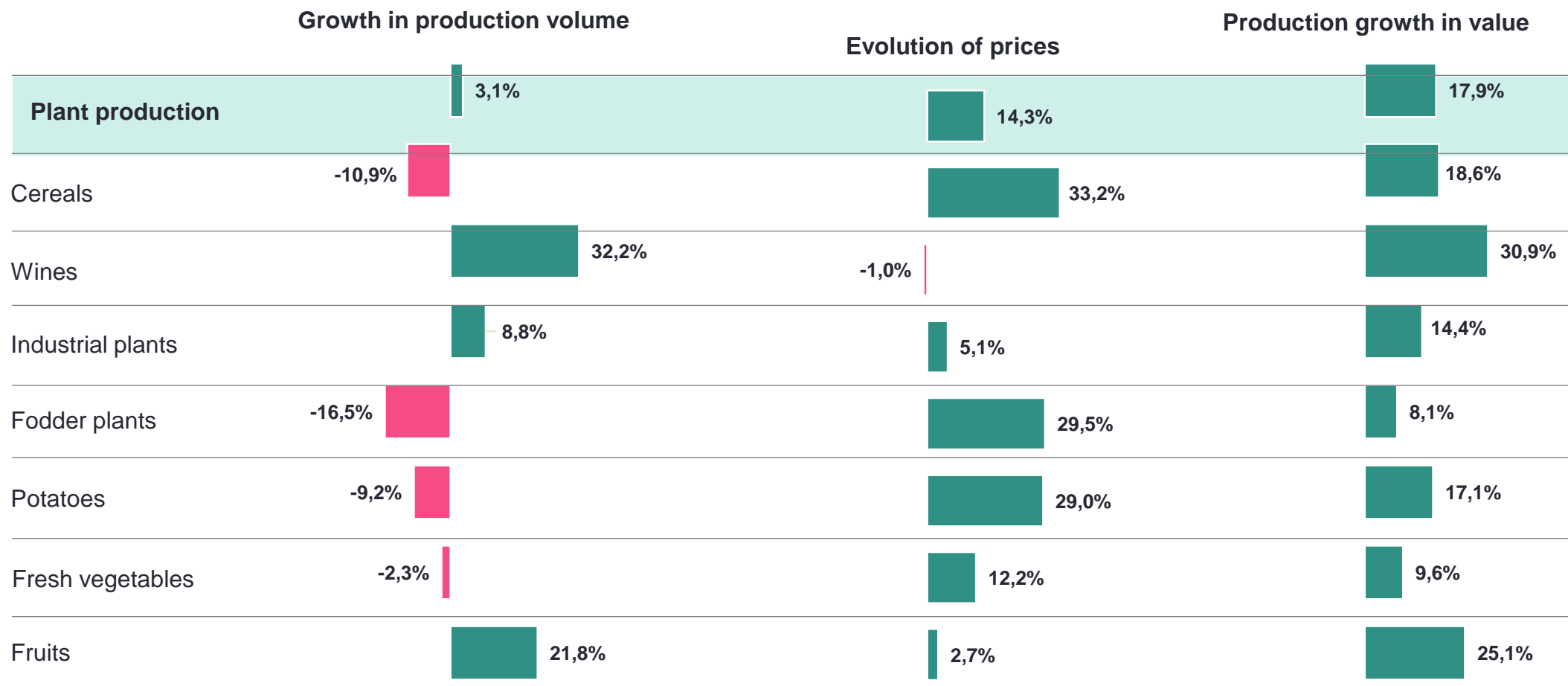
The production of agricultural goods (excluding services) will be divided into 65% crop production and 35% animal production in 2022



Unit: %, share of total production of agricultural goods (excluding services)
Source: Insee, Agriculture Account

Evolution of plant production between 2021 and 2022 in value and volume

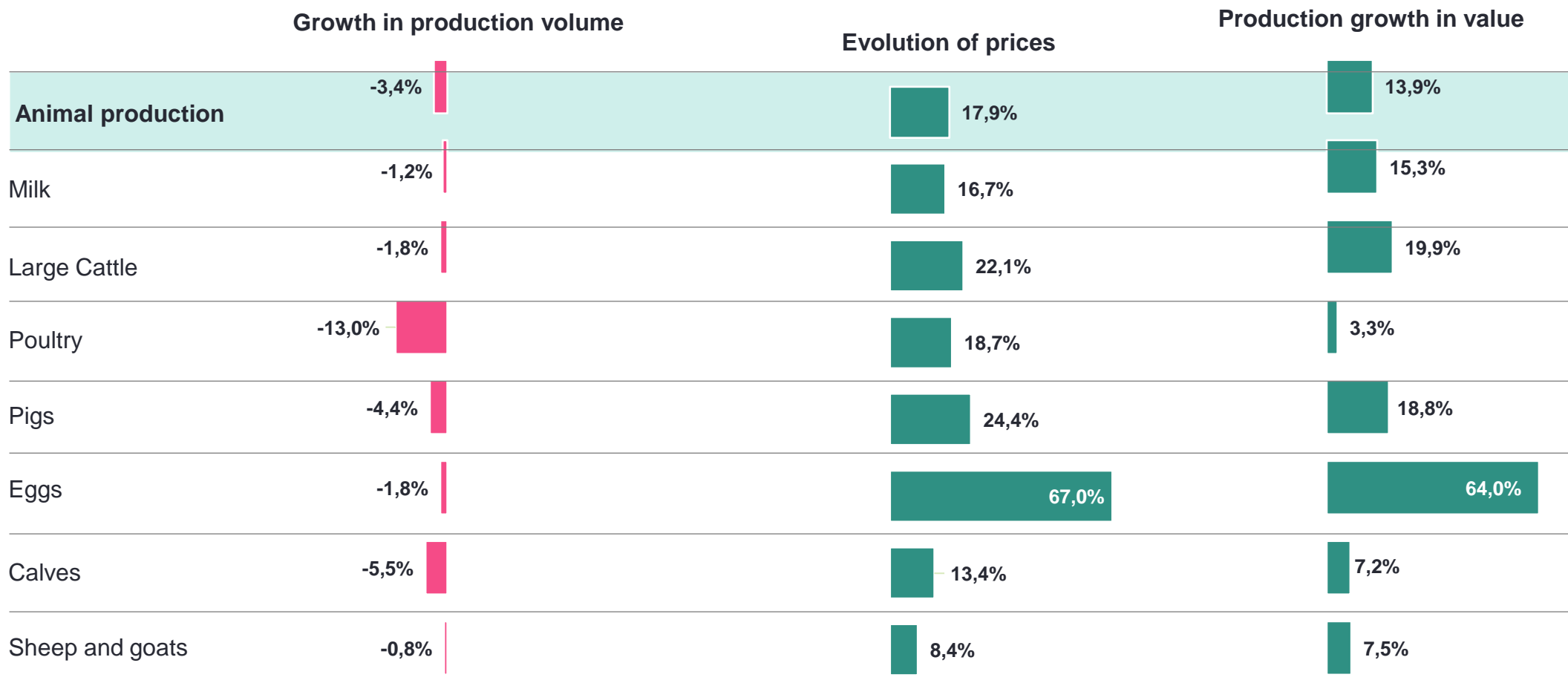
Crop production jumped by +18% in 2022, after +12% in 2021. It is again prices that have driven up production (+14.3%) and the fruit and wine harvests



Unit: %, annual variation 2022 vs 2021; Source: INSEE, provisional data

Evolution of animal production between 2021 and 2022 in value and volume

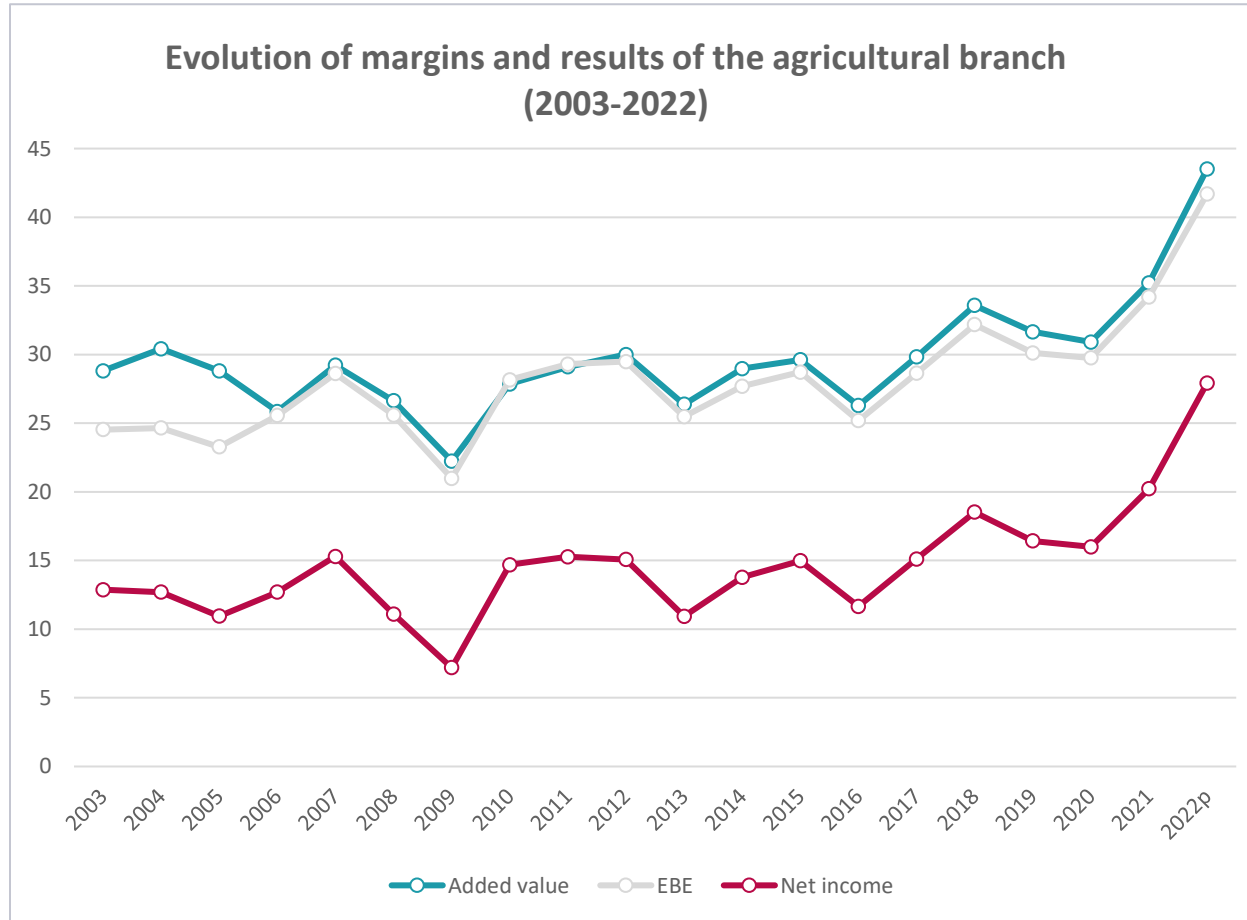
Animal production (gross and processed) increased by +13.9%, despite a 3.4% decrease in volumes produced. As a reminder, animal production had increased by +1.8% in value in 2021, with volumes also down (-1.6%)



Unit: xxx
Source : xxxx

Margins and results of the agricultural sector (2003-2022)

La Ferme France posts record results in 2022



Gross value added 2022: €43.5 billion

= Intermediate production-consumption

+24% vs 2021

+35% vs. average of last 5 years

Gross operating surplus: €41.7 billion

= VA-Loaded salaries+Subsidies

+22% vs 2021

+35% vs. 5-year average

Net income of the branch: €27.9 billion

+38% vs 2021

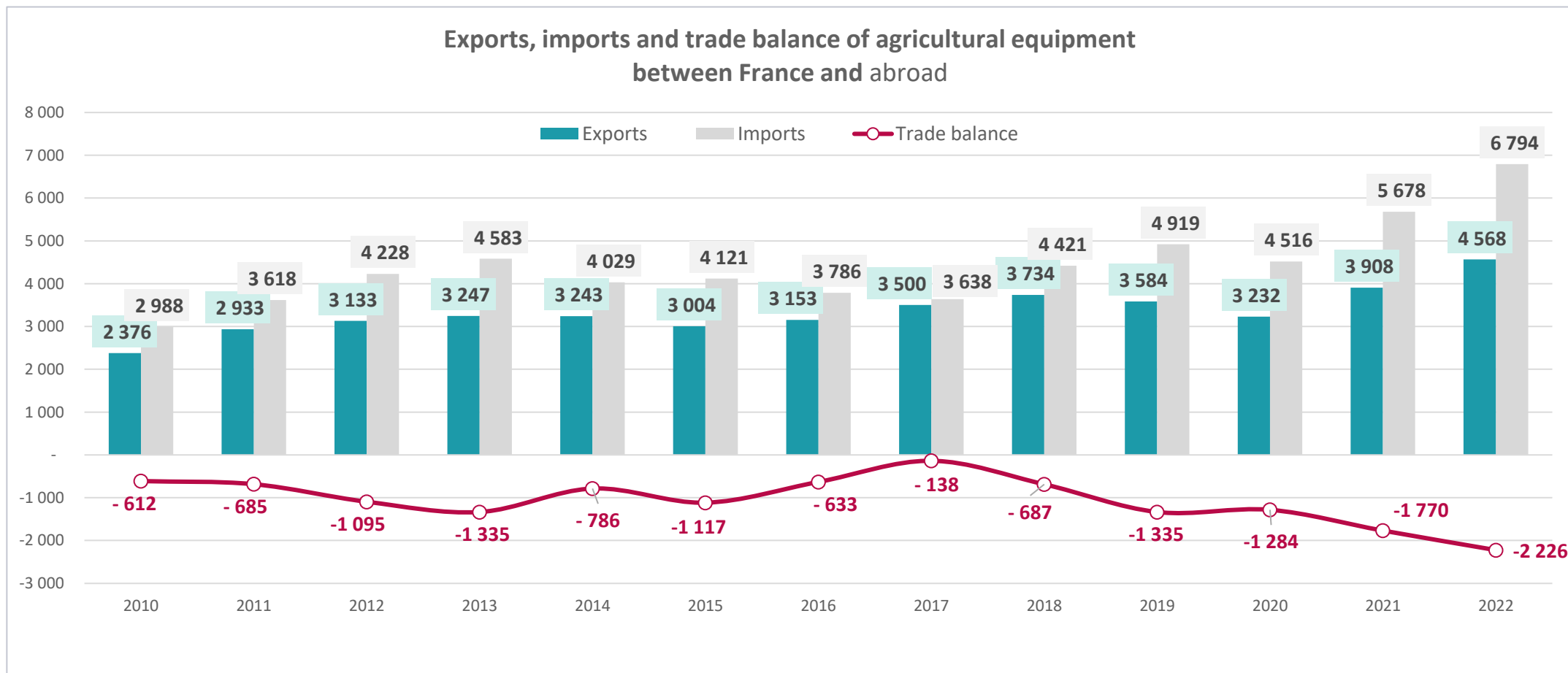
+62% vs. average of last 5 years

EBITDA: Gross operating surplus - Unit: billion euros
 Source: INSEE, provisional agricultural account; (p) provisional data

Foreign trade: French imports and exports of agricultural equipment

Overview (2010-2022)

Foreign trade was still very dynamic in 2022: +17% for exports and +19% for imports. The trade deficit continues to widen



Unit: million euros

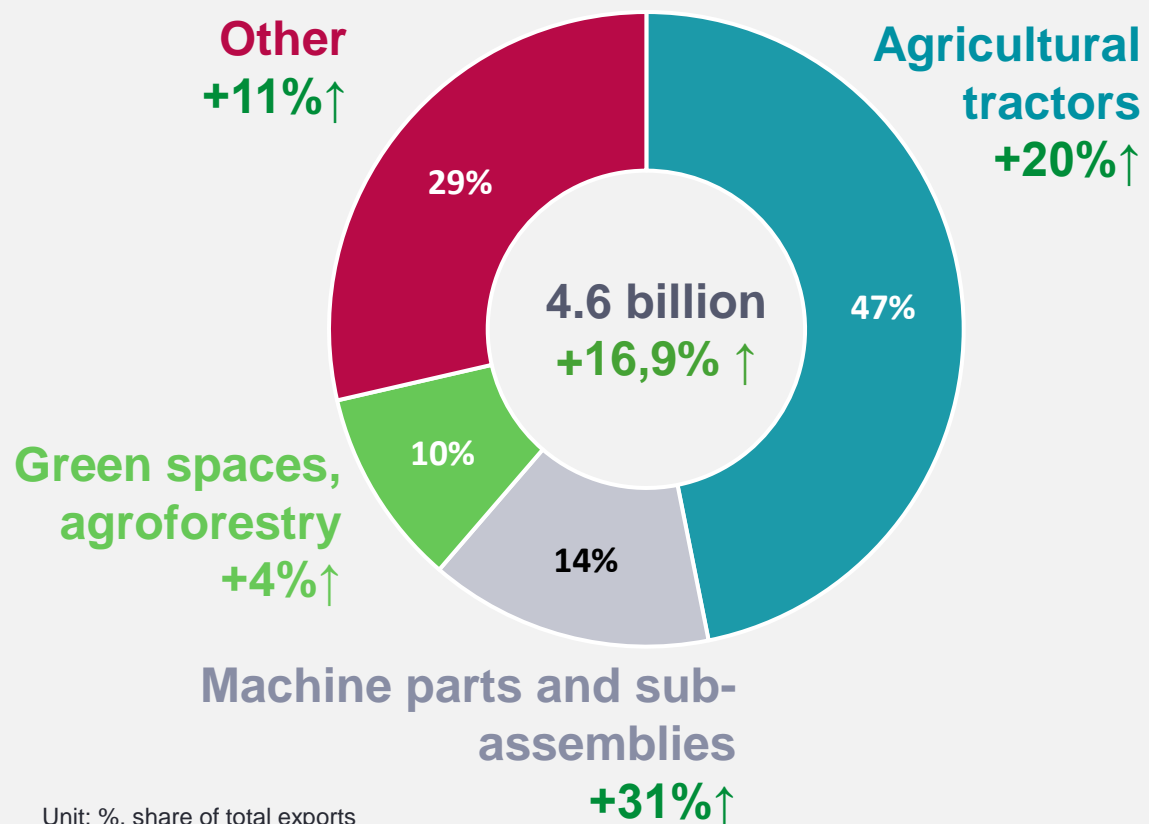
Sources: Customs via Trademap (2021-2022), Eurostat history (2010-2020)

French exports in 2022

A new record of 4.6 billion euros, tractors represent 47% of this total

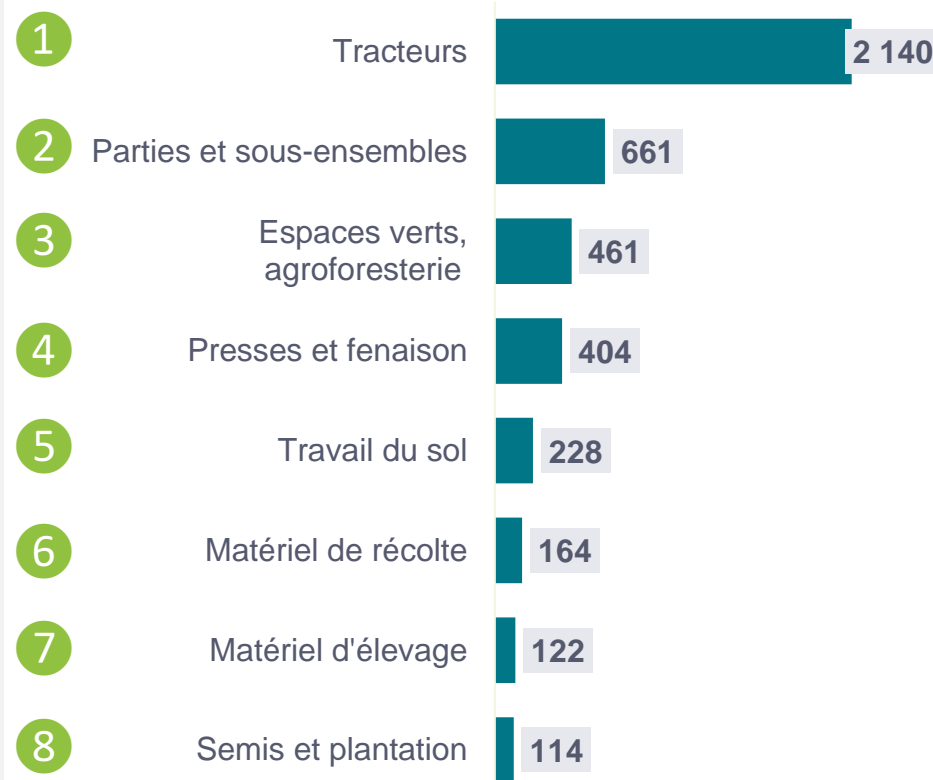


Distribution of exports by major product family in 2022



Unit: %, share of total exports
Source: Customs via Trademap

French exports of AE by product family



Unit: million euros
Source: Customs via Trademap

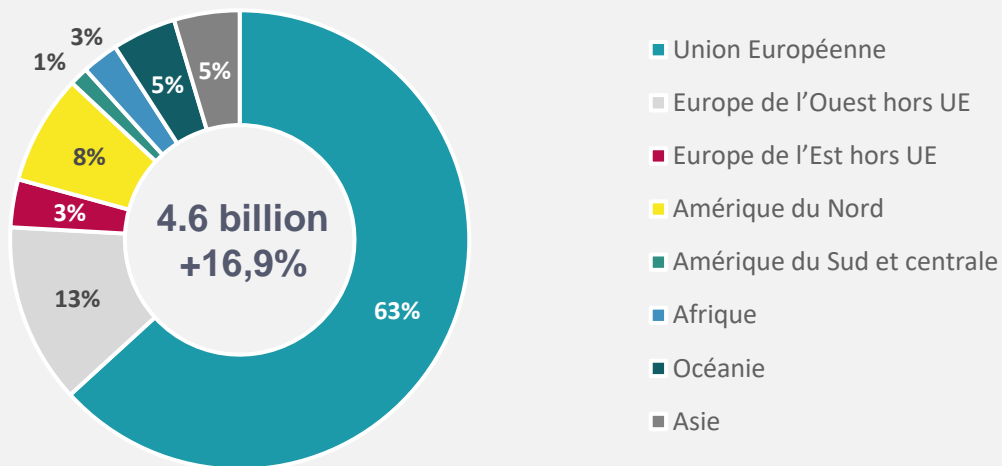
French exports by country and by zone (2017-2022)

37% of exports are outside the European Union



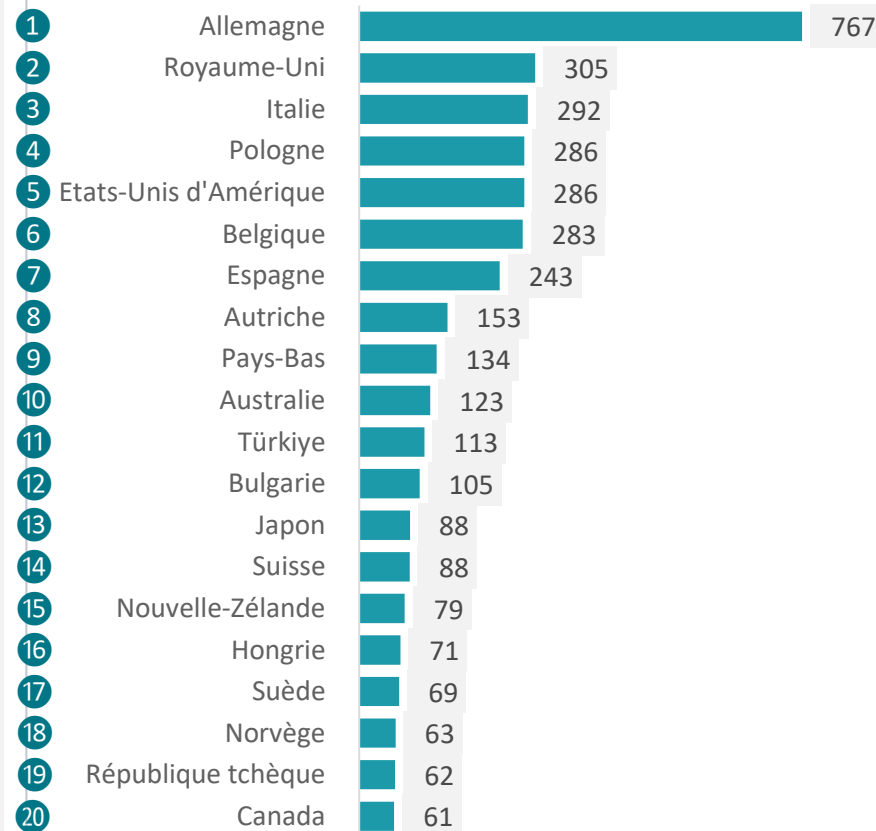
- ❑ France exported its agricultural equipment to 167 countries worldwide in 2022
- ❑ The top 20 destinations account for 80% of French exports
- ❑ The European Union represents 63% of French exports

French exports by geographical area in 2022



Units: million euros; %, share of total exports
Source: Customs via Trademap

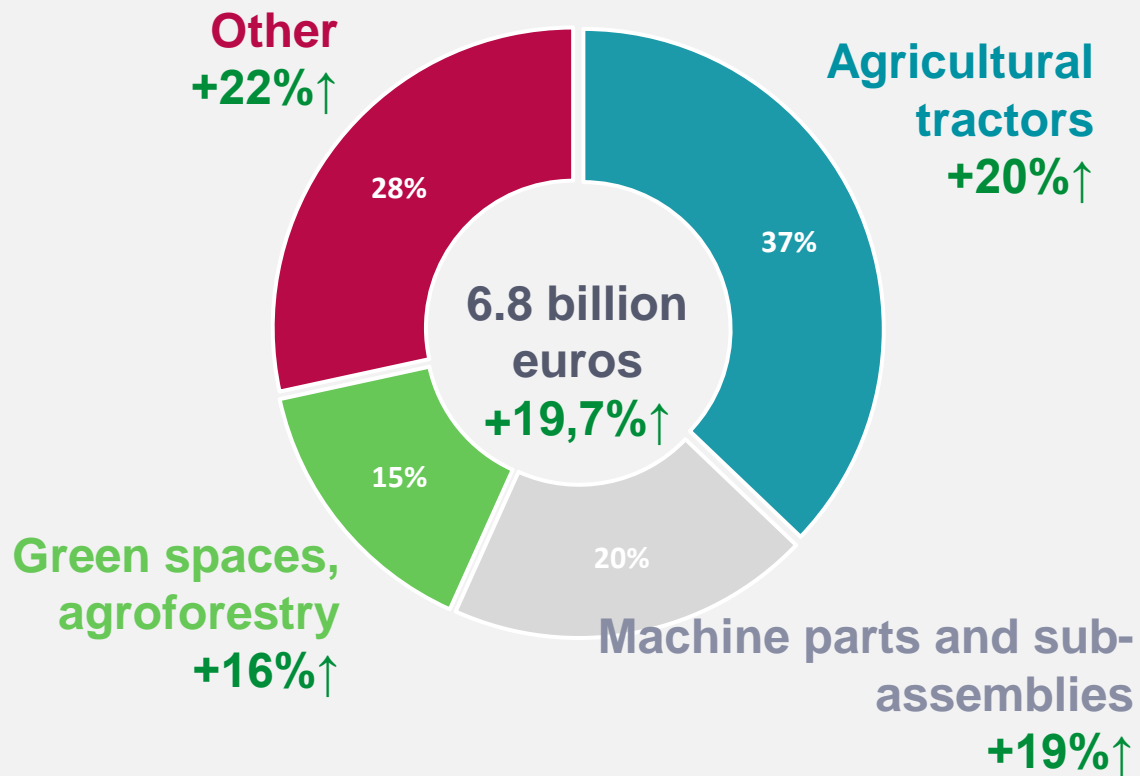
Top 20 export countries of France in 2022



French imports in 2022

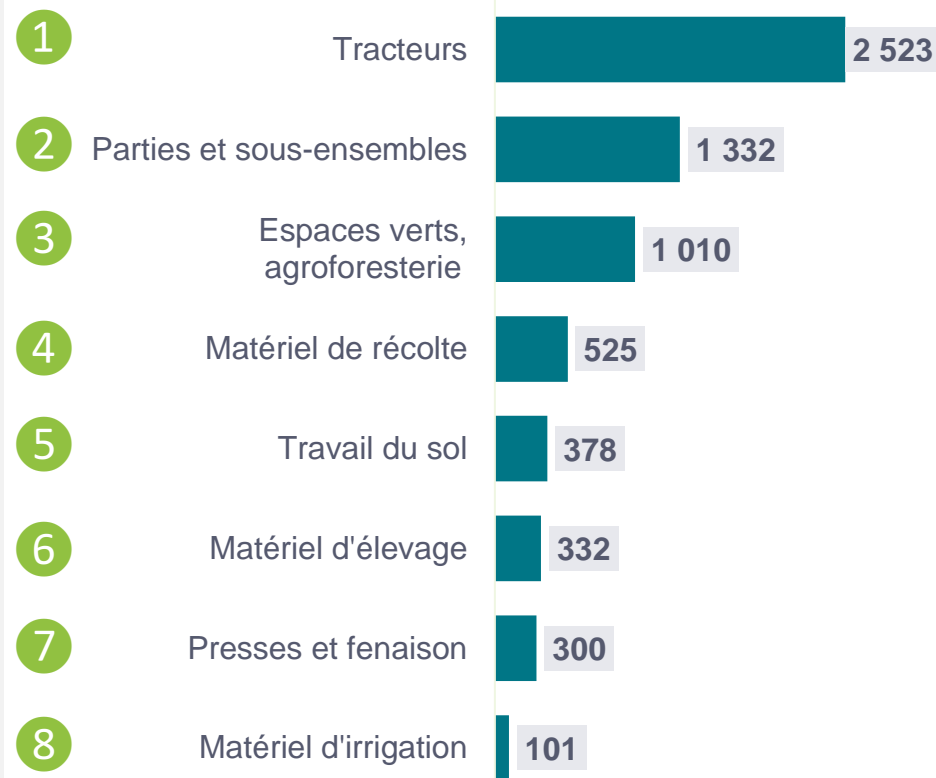
Imports, up 20%, reach a new peak in 2022 at €6.8 billion

Distribution of imports by major product family in 2022



Unit: %, share of total imports
Source: Customs via Trademap

French imports of AE by product family in 2022



Unit: million euros
Source: Customs via Trademap

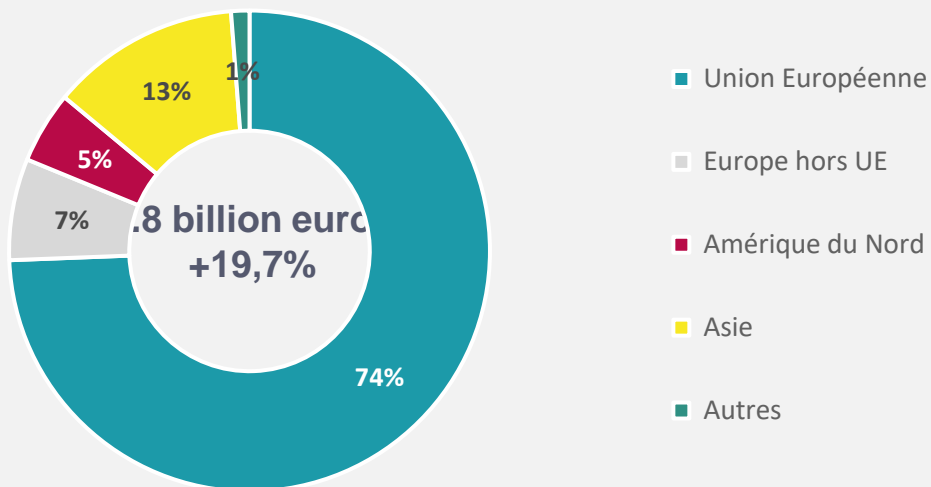
French imports by country and by zone (2017-2022)

More concentrated, 74% of our imports come from the EU 27 and 33% from Germany



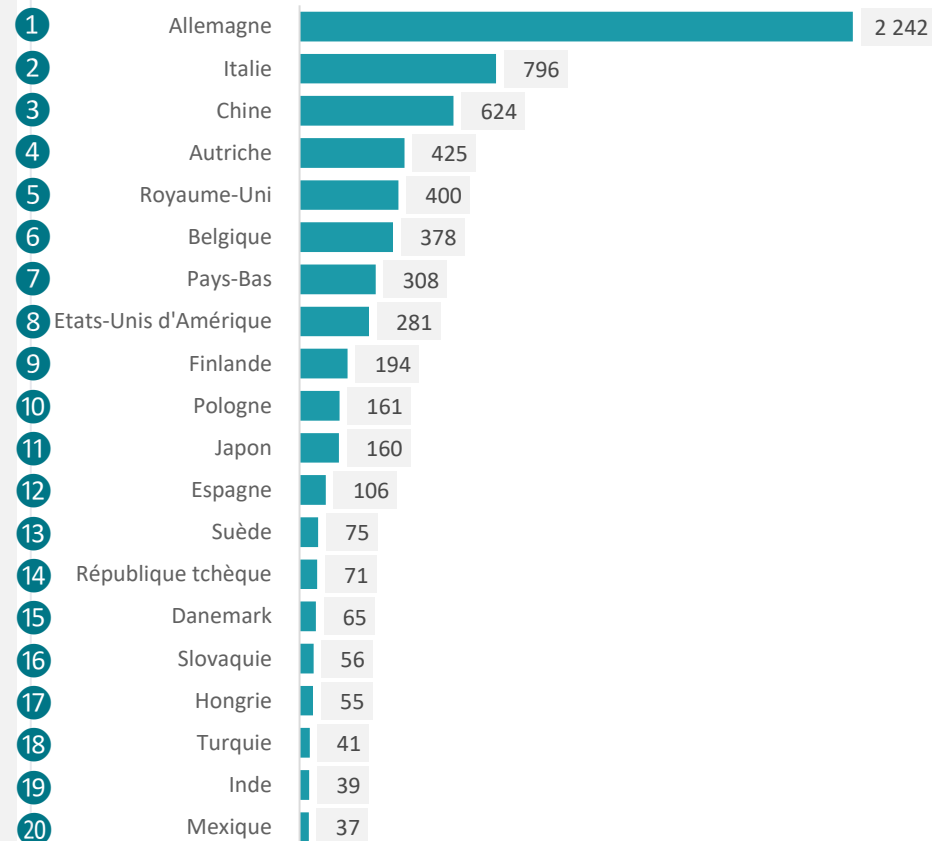
- ❑ France imported its agricultural equipment into 93 countries around the world in 2022
- ❑ The top twenty supplier countries account for 96% of French imports, with Germany alone accounting for 33%.
- ❑ The European Union represents 74% of French agricultural equipment imports

French imports by geographical area



Units: million euros; %, share of total exports
Source: Customs via Trademap

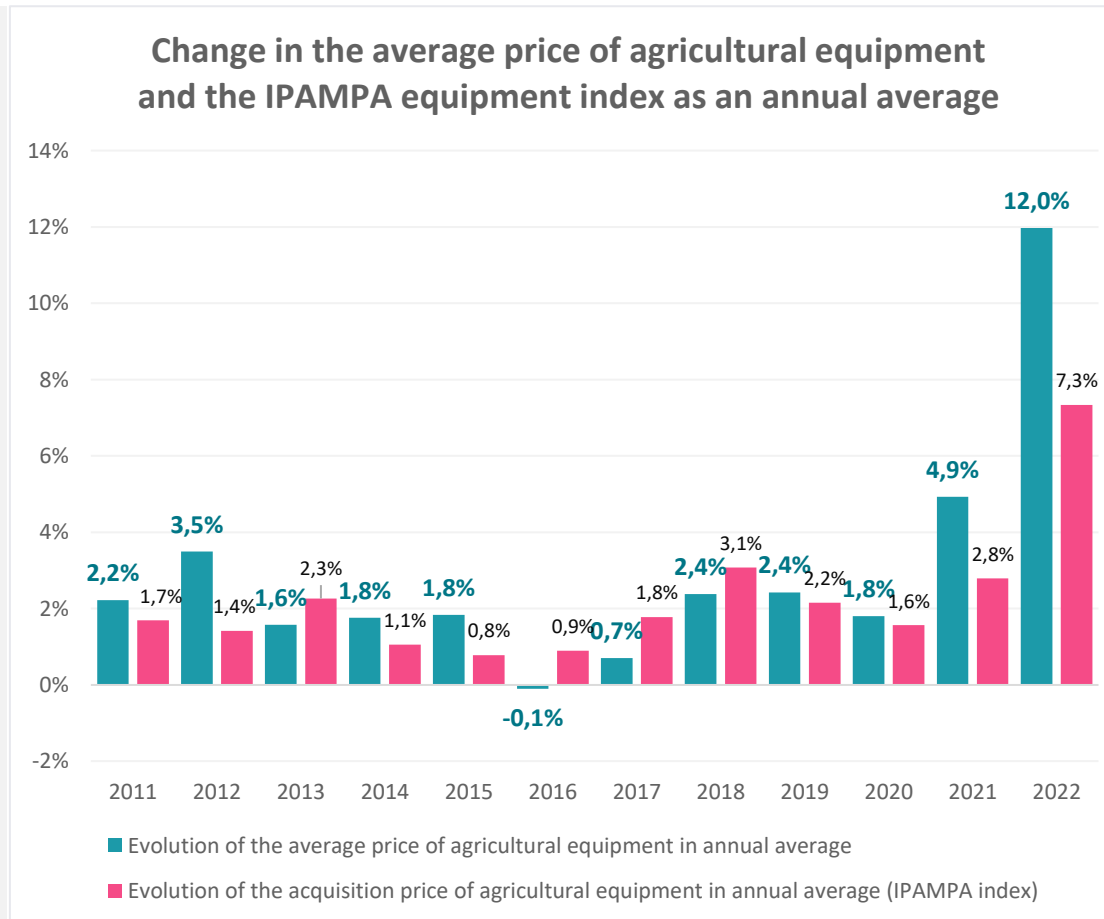
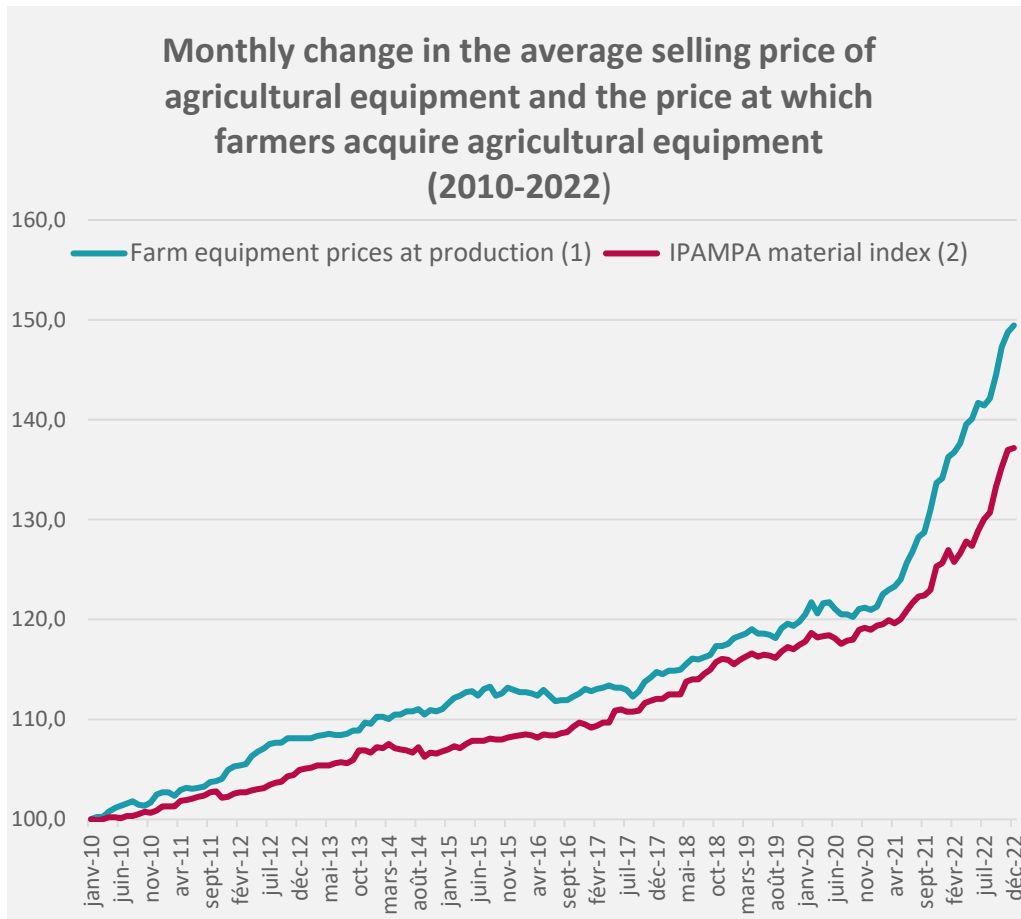
Top 20 supplier countries of France in 2022



The French agricultural equipment market

The agricultural equipment market - new market (2010-2023)

The price of new equipment rose by 12% in 2022 and 17% in two years. Farmers' purchase prices have increased less rapidly, thanks to the cushioning effect of trade-ins

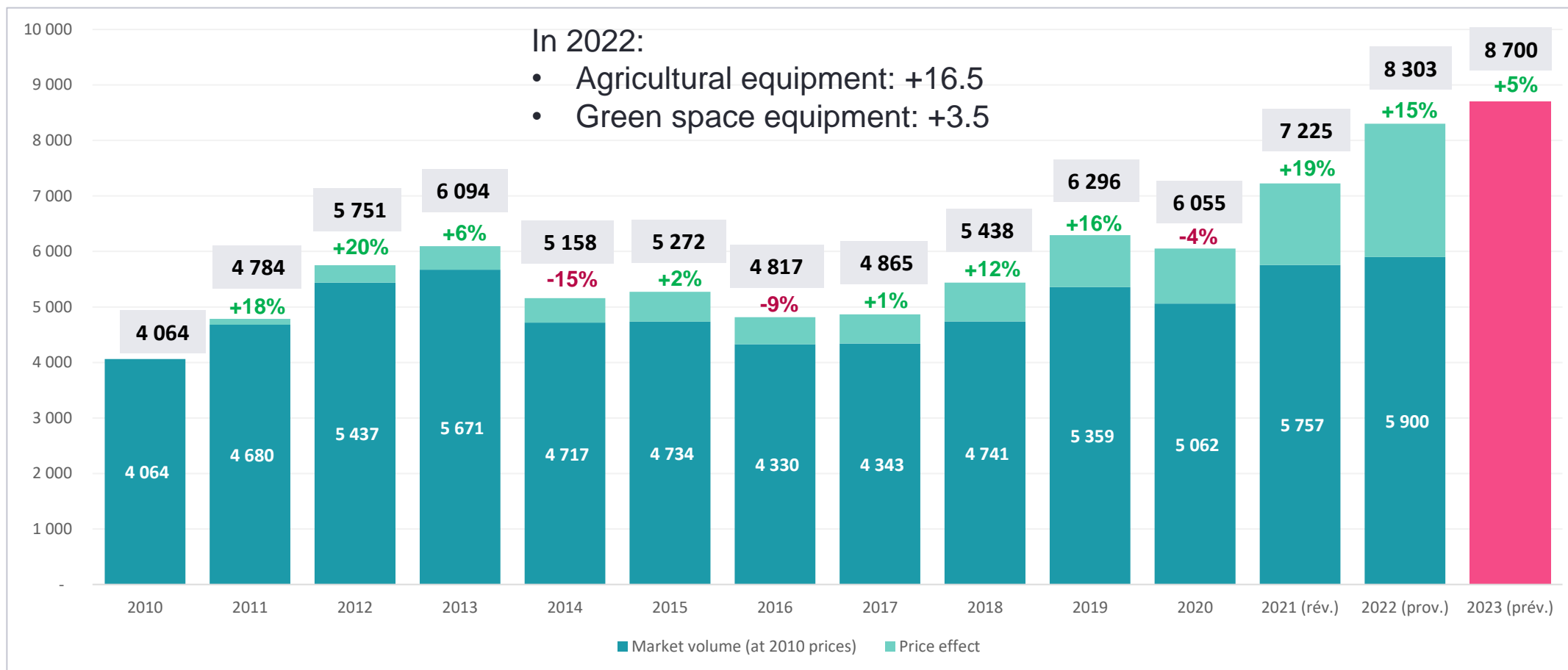


Units: price index, base 100 in 2010; %, annual price change
Sources: INSEE and Agreste

The agricultural equipment market - new market (2010-2023)

2022: another very good year for agricultural equipment;

2023: towards a slowdown before a trend reversal?



Rev: revised data; Prov: provisional data; Forecast: forecast; Units: million euros; %, annual change in value

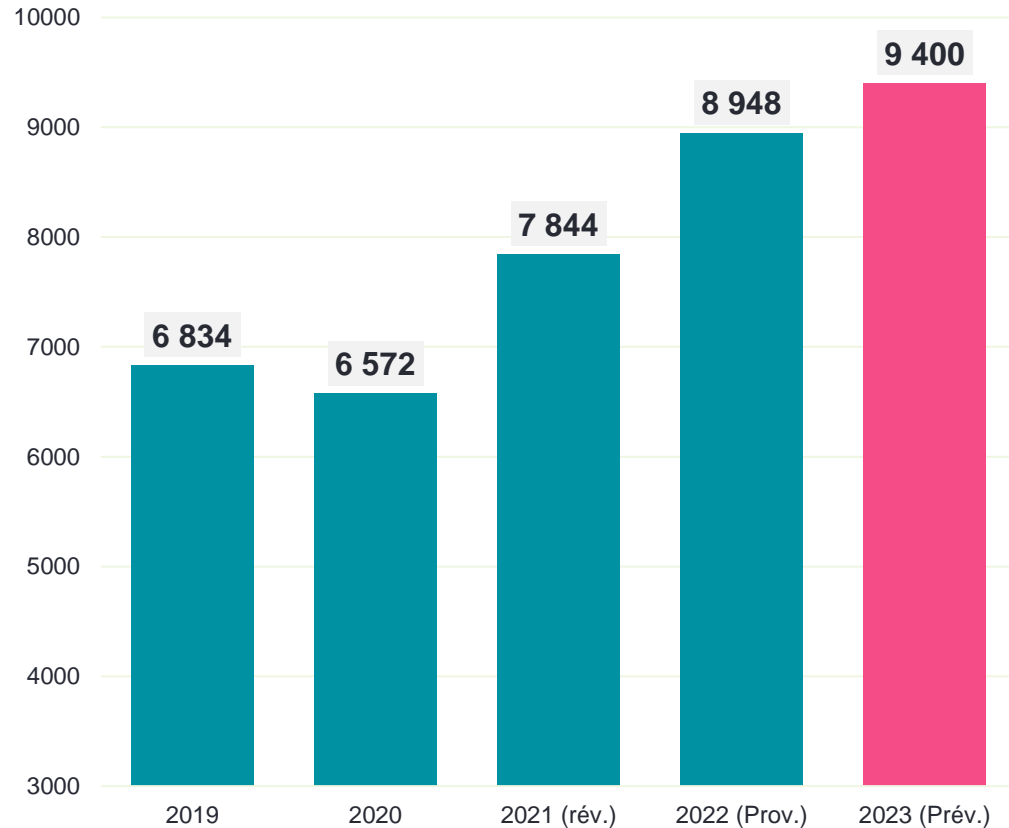
Source: Axema (series without greenhouses and telescopic handlers)

Agricultural equipment market - including telescopic loaders and greenhouses: evolution (2019-2023) and breakdown by product

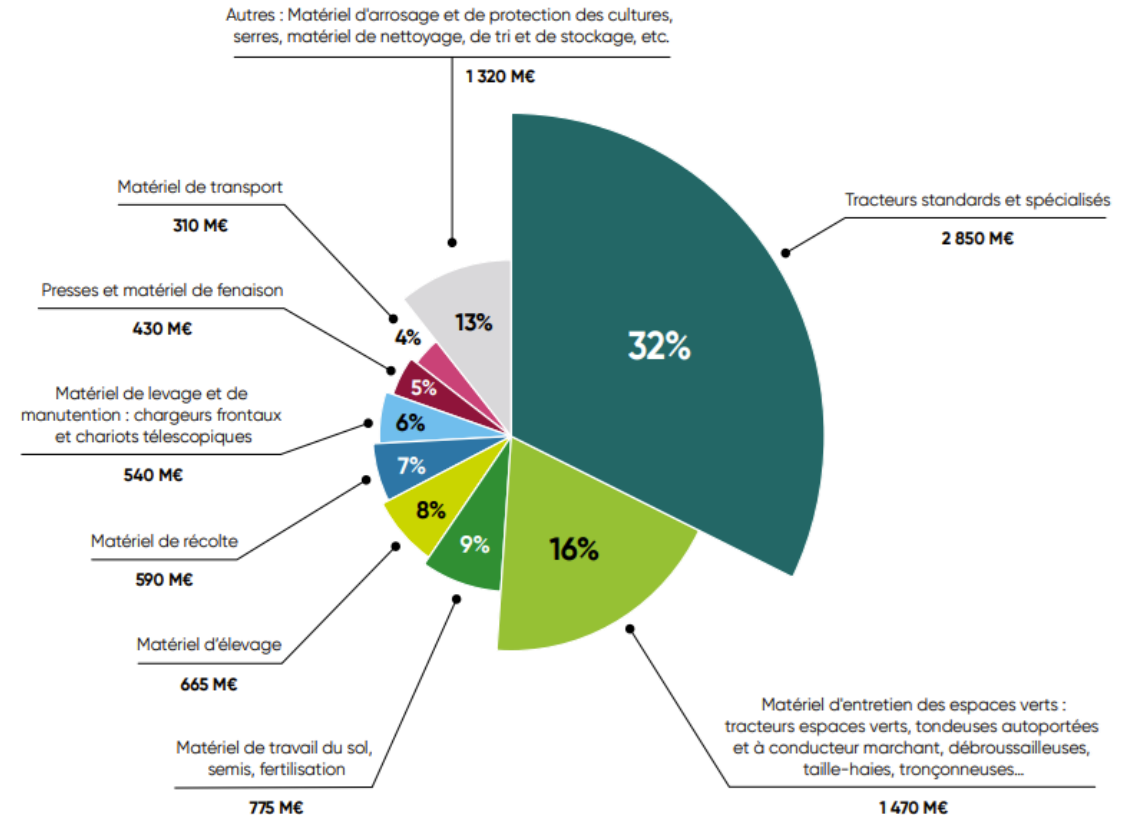
The 9 billion euro mark will be passed in 2023



The market including shippers
Telescopic handlers and greenhouses



Market breakdown by product family in 2022



Rev: revised data; Prov: provisional data; Forecast: forecast; Units: million euros; %, annual change in value
Source : Axema

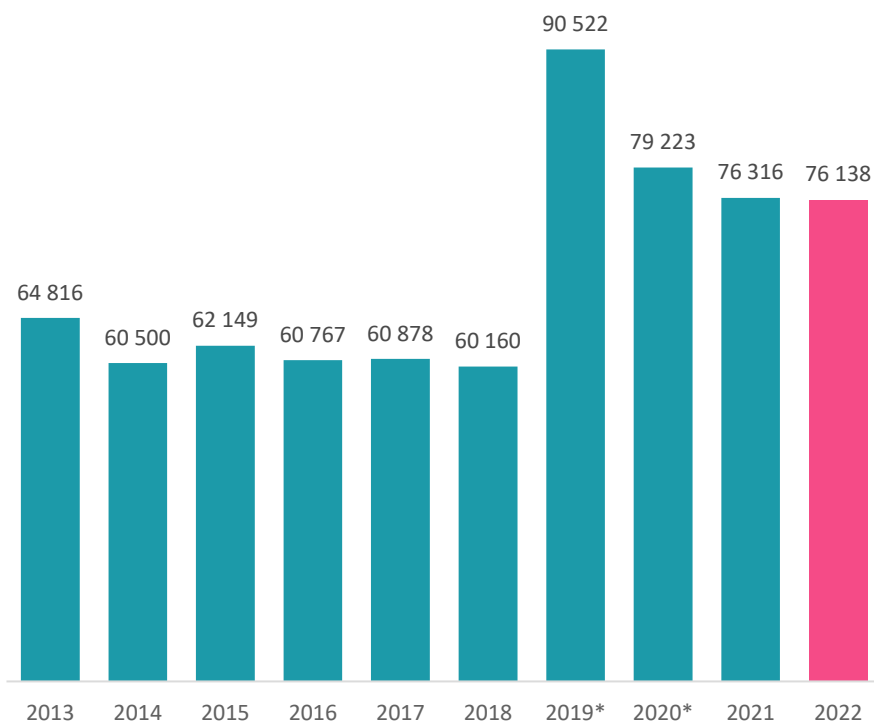
Agricultural vehicle registrations

New farm vehicle registrations (2013-2022)

High altitude stabilization in 2022



First registrations of agricultural vehicles
(excluding quads)



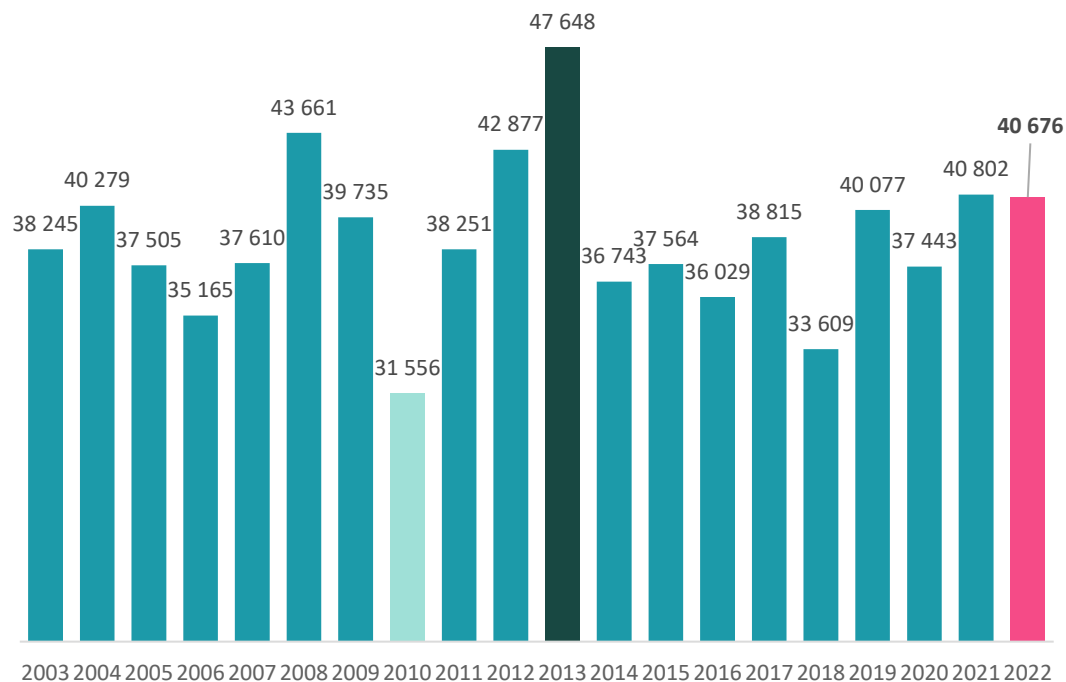
	2018	2019*	2020*	2021	2022	Growth 22/21
Tractor	33 609	40 077	37 443	40 802	40 676	-0,3% ▶
Transport equipment	9 863	20 379	15 101	13 295	12 438	-6,4% ▼
Press and haymaking	5 675	11 339	9 876	7 755	7 973	2,8% ▲
Maintenance of green spaces and roadsides	3 258	3 837	3 002	3 777	4 174	10,5% ▲▲
Soil working, seeding and fertilizing equipment.	2 188	5 421	4 567	3 256	3 383	3,9% ▲
Harvesting equipment	2 693	3 775	3 636	2 833	2 998	5,8% ▲
Crop protection equipment	1 271	2 524	2 484	2 199	2 236	1,7% ▲
Breeding equipment	1 396	2 703	2 389	1 700	1 628	-4,2% ▼
Irrigation equipment	64	112	190	184	137	-25,5% ▼▼
Unidentified material	143	355	535	515	495	-3,9% ▼
Grand total	60 160	90 522	79 223	76 316	76 138	-0,2% ▶

Units: number of registrations; %, annual change; (*) 2019 and 2020 were atypical years marked by the registration of many older vehicles due to the entry into force of the Decree of December 19, 2016 - Source: Axema, SIV-DIVA

Tractor registrations in France

Above the 40,000 units and the long-term average (38,000 units)

The first tractor registrations (2003-2022)



Unit: number of tractors
Source: Axema, SIV-DIVA

The first tractor registrations by subfamily

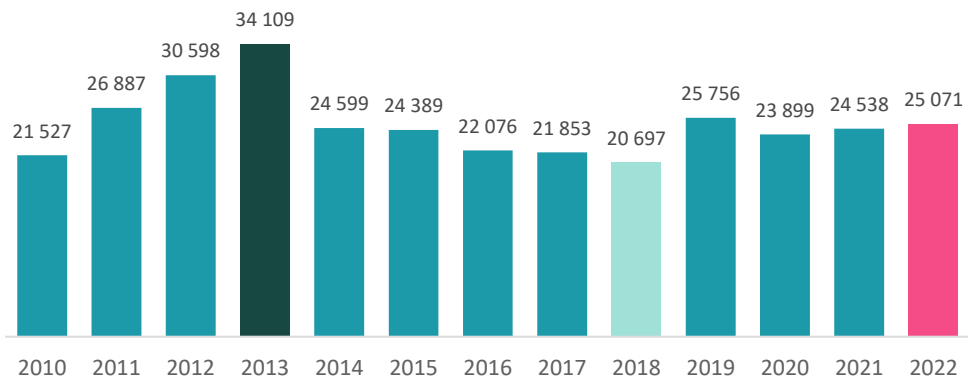
	2018	2019	2020	2021	2022	Growth 22/21
Standard tractor	20 697	25 756	23 899	24 538	25 071	2,2%
Green spaces tractor	5 578	3 773	4 489	6 597	6 035	-8,5%
Telescopic loader	3 597	5 395	4 597	4 679	4 977	6,4%
Tractor for vineyards and orchards	2 917	4 070	3 771	4 265	3 751	-12,1%
Vineyard trimmer	492	741	337	391	576	47,3%
Wheel loader* (with wheels)	1	4	7	15	11	-26,7%
Other tractors	327	338	343	317	255	-19,6%
Total tractors	33 609	40 077	37 443	40 802	40 676	-0,3%

Units: number of tractors and %, annual variation
Source: Axema, SIV-DIVA

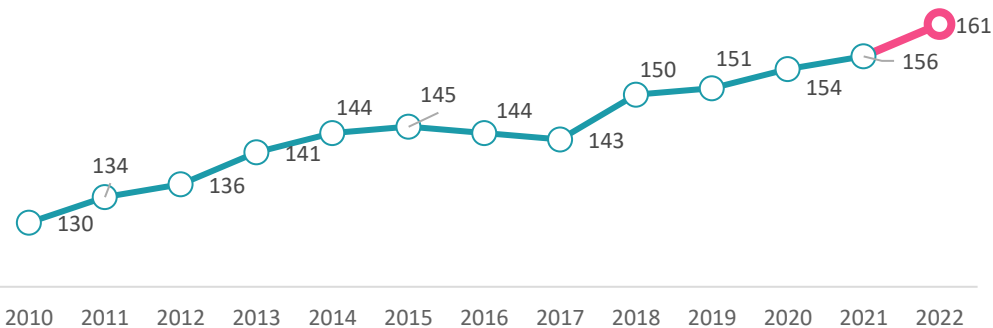
Standard tractor registrations

+2.2% in 2022; average power continues to grow

First registrations of standard tractors

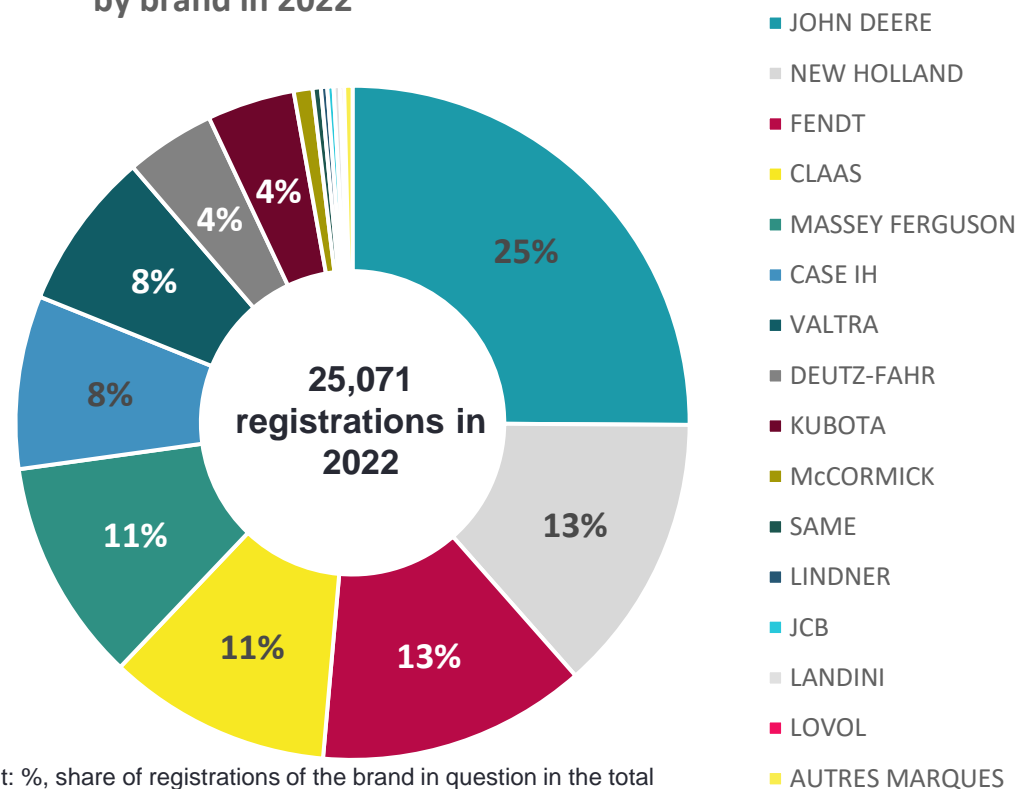


The average power of standard tractors in horses



Units: number of tractors registered for the first time; average horsepower
 Source: Axema, SIV-DIVA

Distribution of first registrations by brand in 2022



Unit: %, share of registrations of the brand in question in the total number of first registrations of standard tractors in 2022
 Source: Axema, SIV-DIVA



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