



**CAFMA**

CAMARA ARGENTINA FABRICANTES  
DE MAQUINARIA AGRICOLA

# ARGENTINIAN CHAMBER OF AGRIMACHINERY MANUFACTURERS

AGRIEVOLUTION REPORT – OCTOBER 2023

# ARGENTINIAN AGRIMACHINERY INDUSTRY

## FIRST APPROACHES



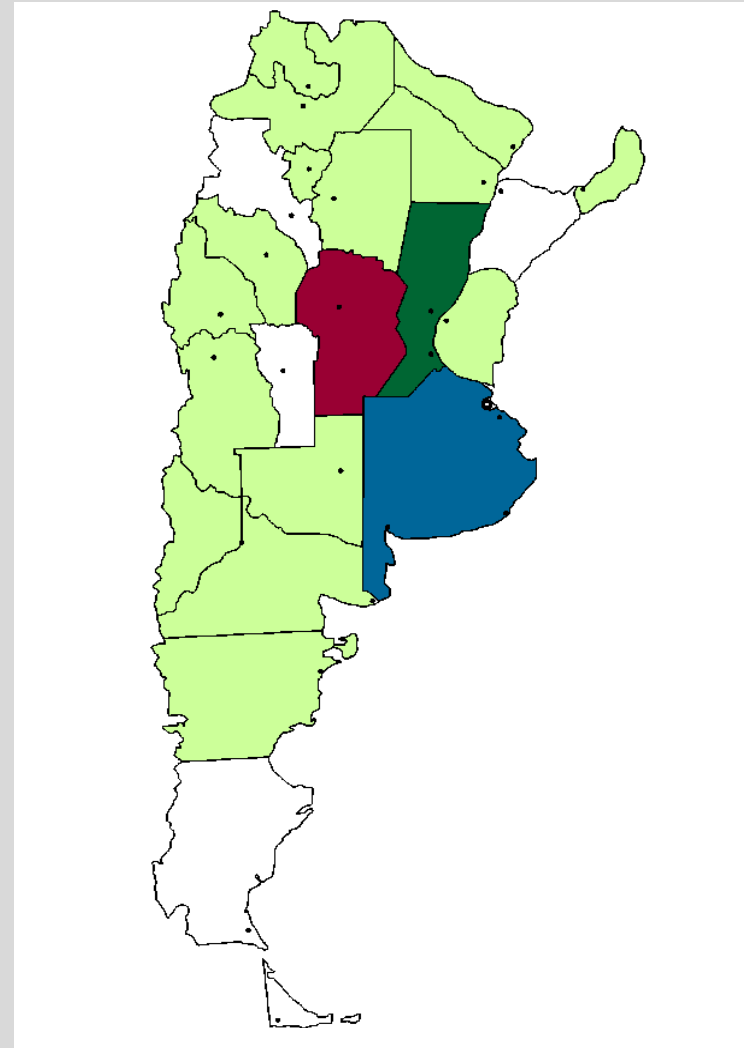
- 1260 companies
- 51% assembly companies and 49% spare parts.
- 38,000 direct employments
- 97% local companies
- 86% family-owned companies
- 23% regularly export
- 25 export destinations





# 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 – First Semester 2023

# EXPORTS

MAIN CROPS - Percentage of participation in total exports – First Semester 2023



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**SOY  
BEAN**  
22,3%



**WHEAT**  
2,3%



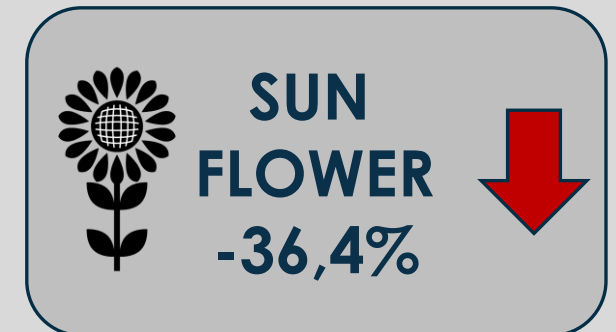
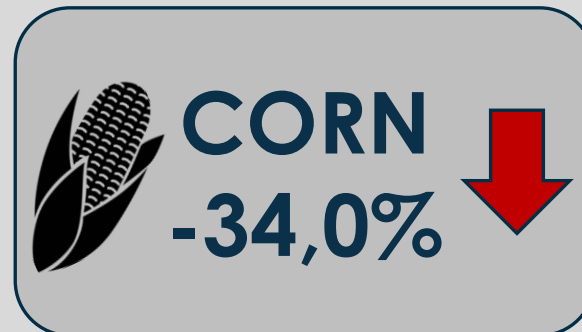
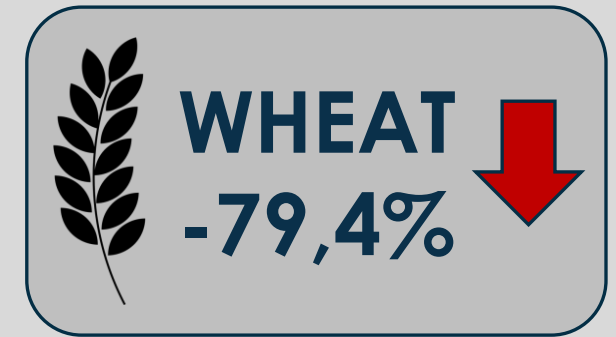
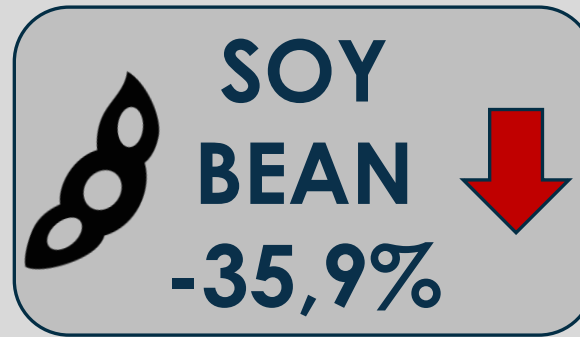
**CORN**  
9,4%



**SUN  
FLOWER**  
2,1%

# EXPORTS

MAIN CROPS – Exports variation form August 2022 to August 2023

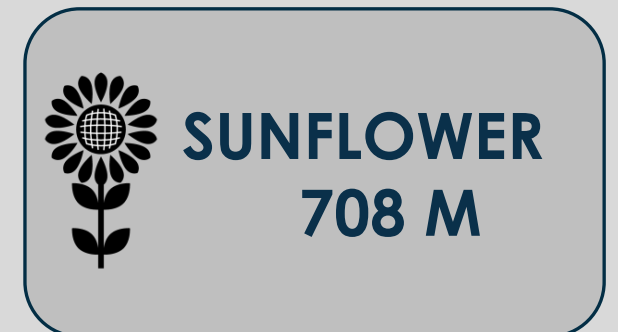
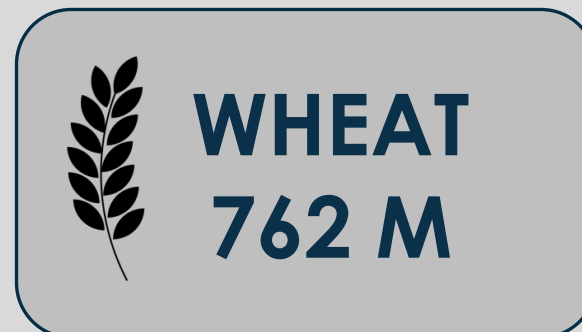


# ARGENTINIAN AGRICULTURE

MAIN CROPS – Total exports in million dollars – First Semester 2023



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# 2022/2023 CAMPAIGN RESULTS

MAIN PRODUCTS – 2021/2022 Comparison



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SOY BEAN		
	2021/22 Campaign	2022/23 Campaign
Sown	16,3 Mha	16,2 Mha 
Yield	27,9 qq/ha	15,4 qq/ha 
Total Production	42,2 Mt	21,0 Mt 







# 2022/2023 CAMPAIGN RESULTS

MAIN PRODUCTS – 2021/2022 Comparison



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CORN		
	2021/22 Campaign	2022/23 Campaign
Sown	7,7 Mha	7,1 Mha 
Yield	69,9 qq/ha	50,6 qq/ha 
Total Prod	52,0 Mt	34,0 Mt 

# 2022/2023 CAMPAIGN RESULTS

MAIN PRODUCTS – 2021/2022 Comparison







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WHEAT		
	2021/22 Campaign	2022/23 Campaign
Sown	6,6 Mha	6,1 Mha 
Yield	34,4 qq/ha	22,8 qq/ha 
Total Prod	21,8 Mt	12,4 Mt 

# 2022/2023 CAMPAIGN RESULTS

MAIN PRODUCTS – 2021/2022 Comparison



SUNFLOWER		
	2021/22 Campaign	2022/23 Campaign
Sown	1,7 Mha	2,0 Mha 
Yield	20,4 qq/ha	19,9 qq/ha 
Total Prod	3,4 Mt	3,9 Mt 

# PRODUCTION EVOLUTION

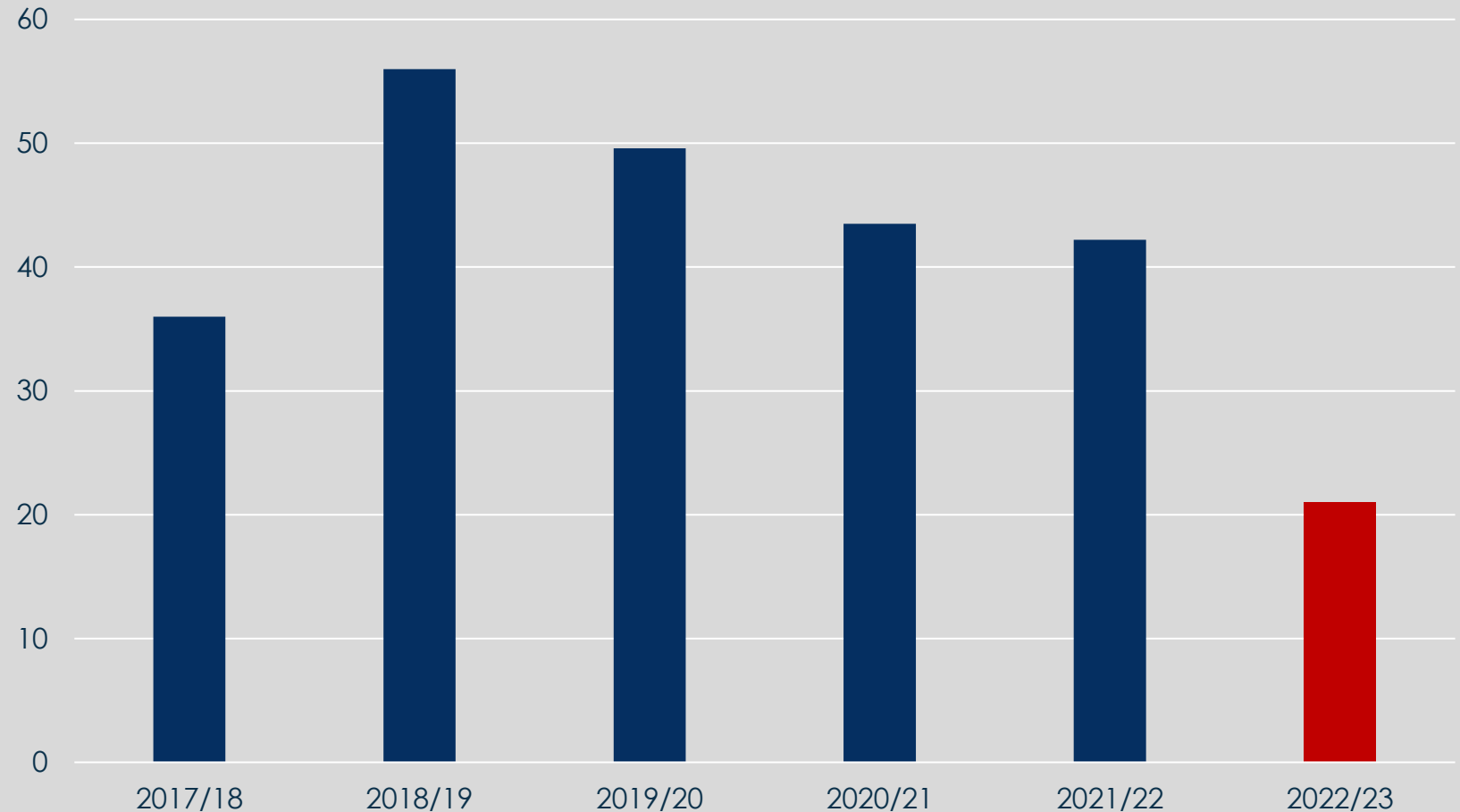
## SOY BEAN



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Production (MTn)



Source: Bolsa de Cereales / Bolsa de Comercio de Rosario

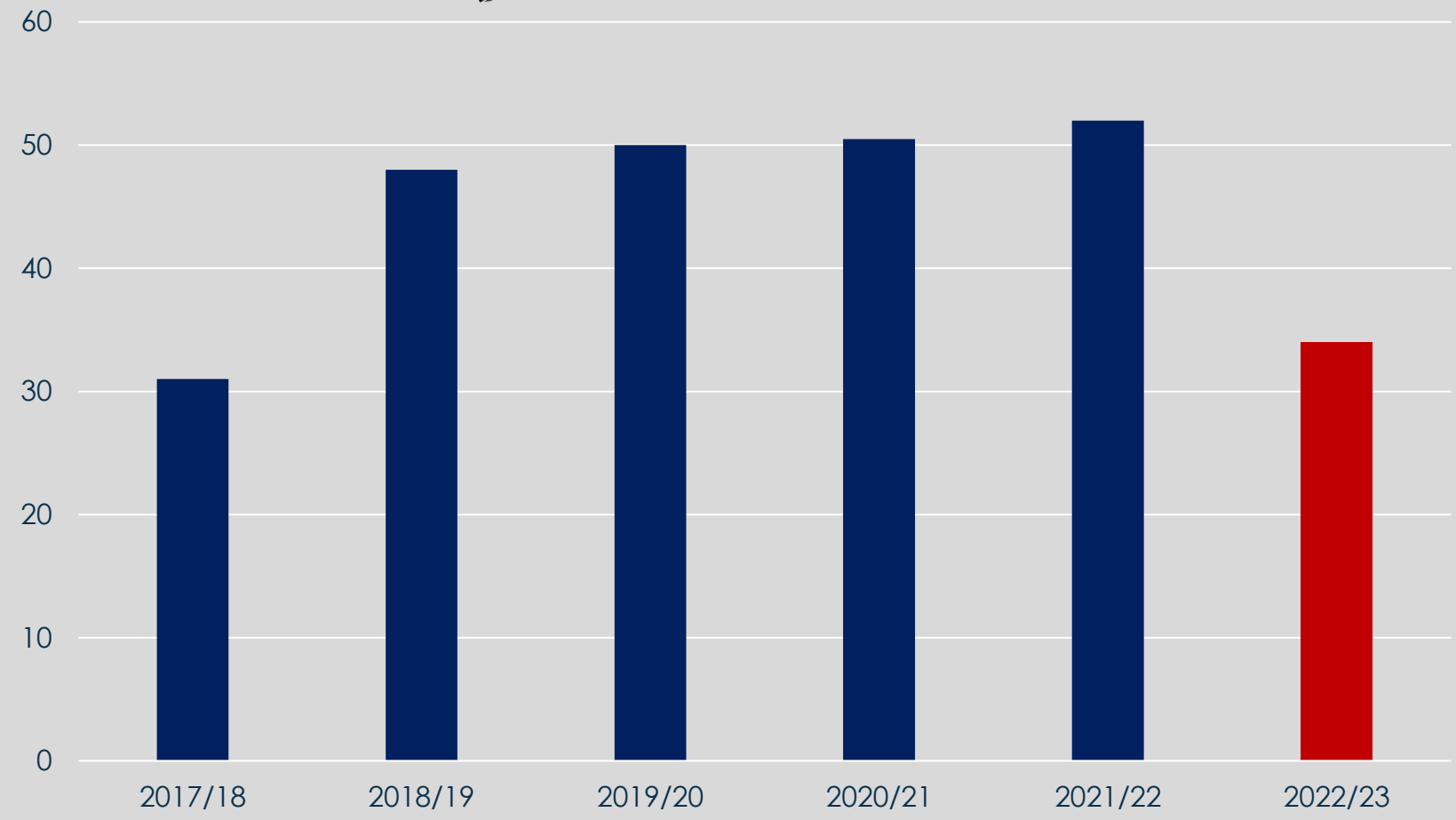
■ 2017/18 ■ 2018/19 ■ 2019/20 ■ 2020/21 ■ 2021/22 ■ 2022/23

# PRODUCTION EVOLUTION

## CORN



Production (MTn)



Source: Bolsa de Cereales

■ 2017/18 ■ 2018/19 ■ 2019/20 ■ 2020/21 ■ 2021/22 ■ 2022/23

# PRODUCTION EVOLUTION

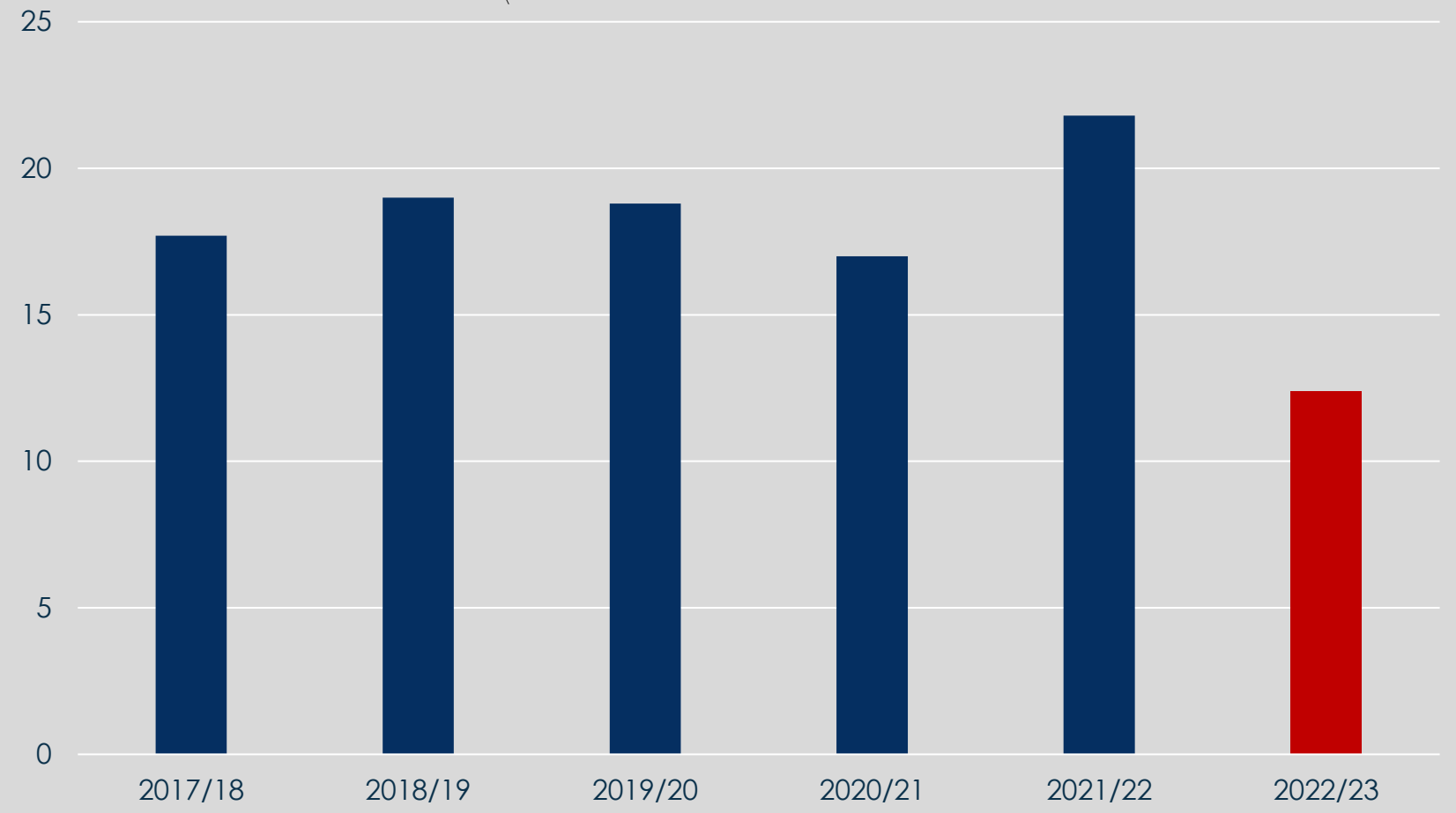
## WHEAT



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Production (MTn)



Source: Bolsa de Cereales / INTA

■ 2017/18 ■ 2018/19 ■ 2019/20 ■ 2020/21 ■ 2021/22 ■ 2022/23

# PRODUCTION EVOLUTION

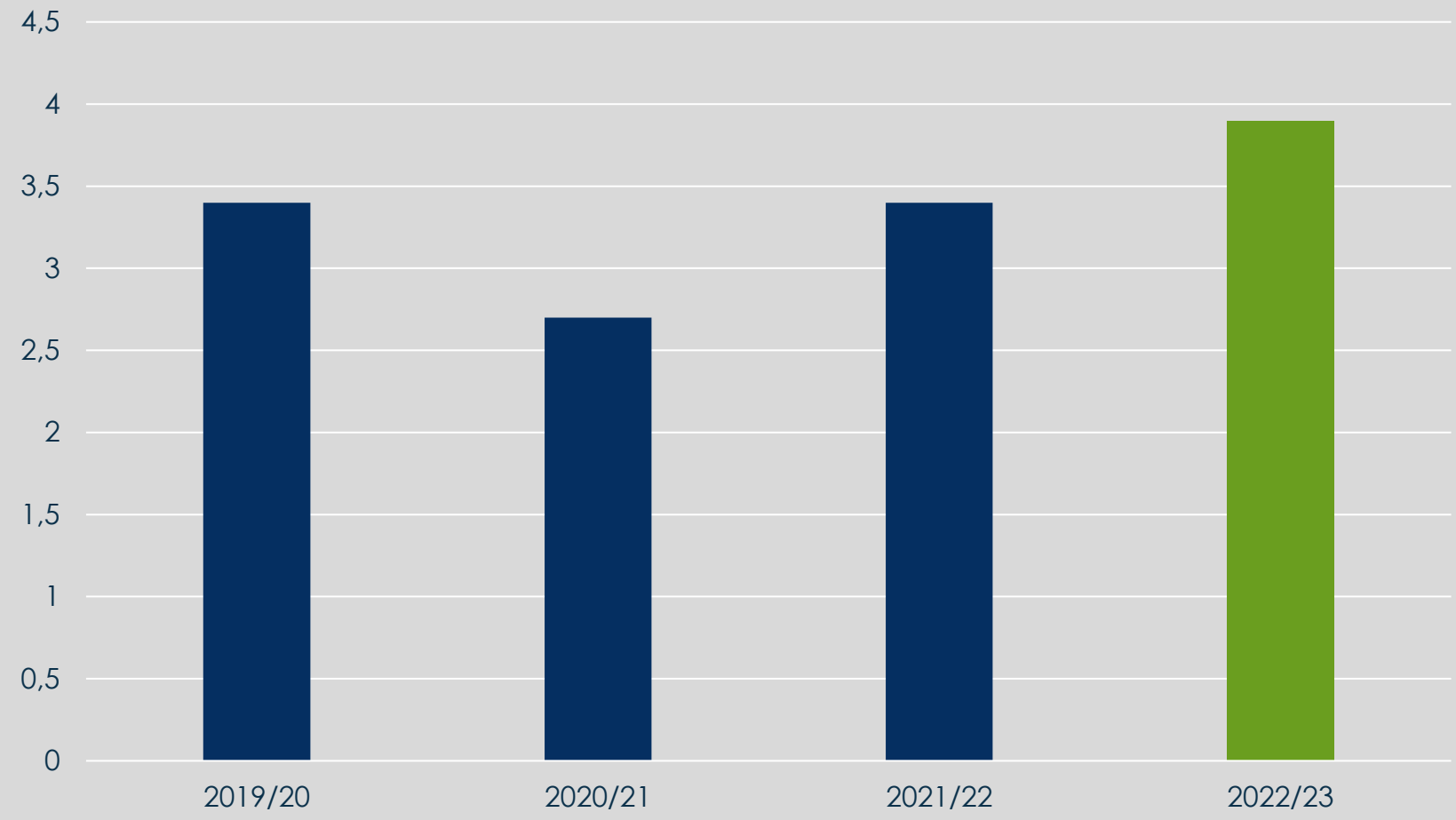
## SUNFLOWER



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Production (MTn)



Source: Bolsa de Cereales

■ 2019/20 ■ 2020/21 ■ 2021/22 ■ 2022/23



# ARGENTINIAN AGRIMACHINERY MARKET



# ARGENTINIAN AGRIMACHINERY NATIONAL MARKET



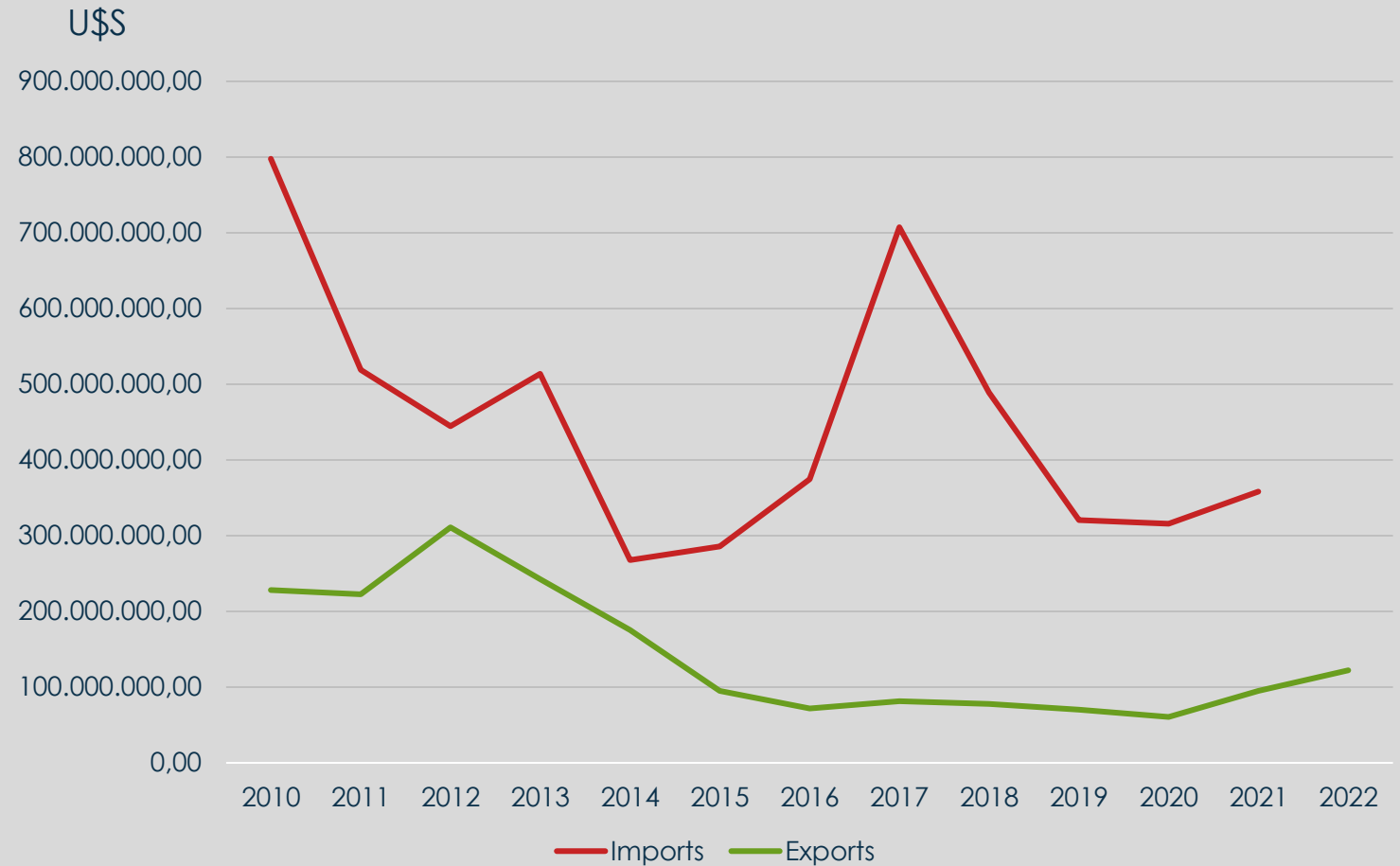
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TOTAL SALES – First Semester 2021/22/23 – In units

TOTAL SALES			
PRODUCT	2021	2022	2023
Harvesters	418	592	401 ↓
Tractors	3187	4028	4055 ↑
Planters	1181	1308	657 ↓
Sprayers	600	590	532 ↓
Grain storage and hauling machinery	2194	2067	1133 ↓

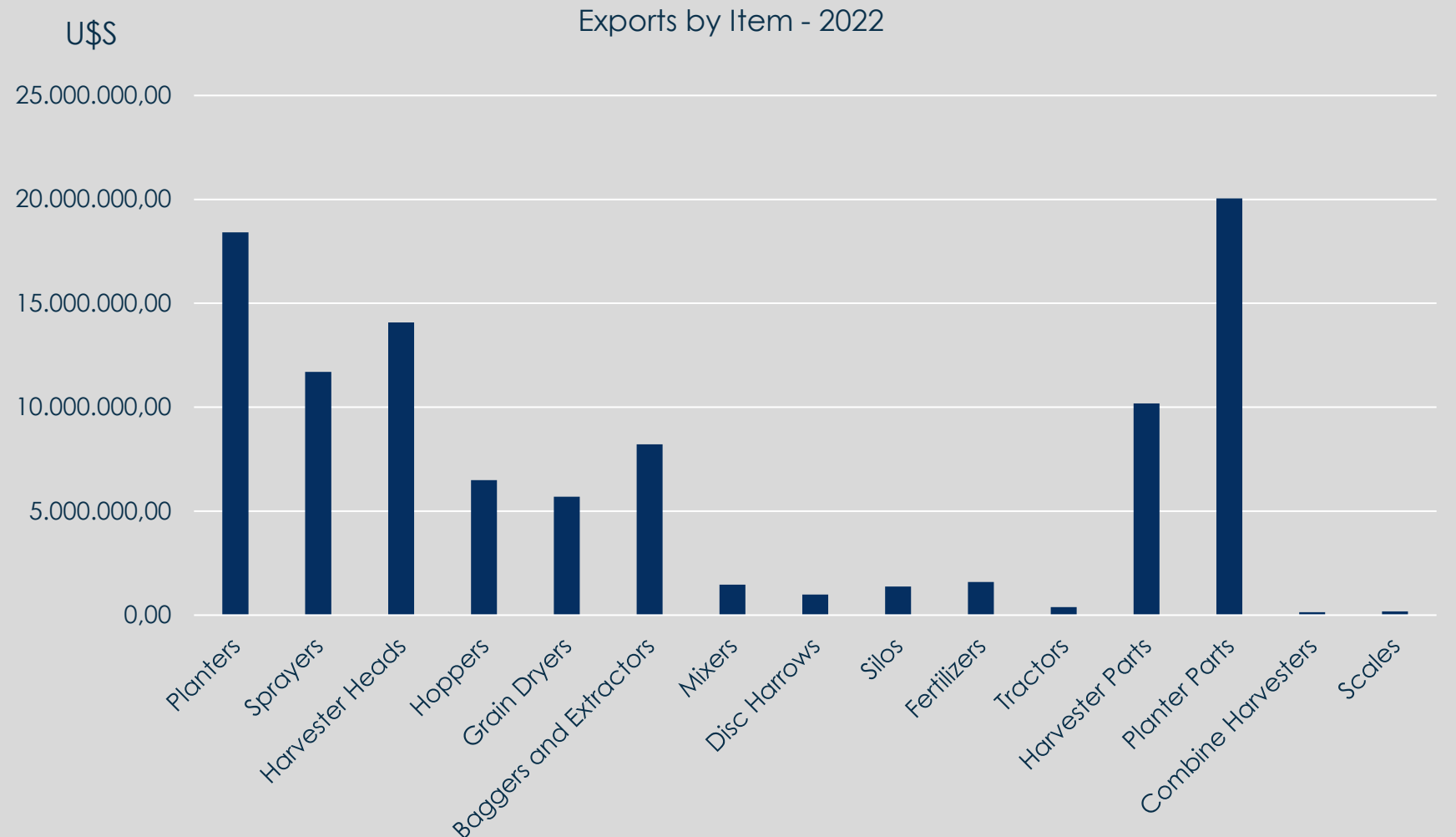
# IMPORTS - EXPORTS

EVOLUTION 2010 - 2022



# EXPORTS

## MAIN ITEMS, 2022



# CONCLUSIONS



- One of the **worst droughts** of Argentinian history happened since November 2022.
- The **large drop** in crops production negatively affected the country's macroeconomy.
- The sales and production of machinery has been **minimized**, due to the economic context and political uncertainty.
- The participation of banks with **financing at trade fairs** helped to maintain the activity in the first half of the year.
- The drop in the production and sales of agricultural machinery will be reflected in the next report.