

Agrievolution Global Markets Overview



EIMA 2024
Press conference



About

Agrievolution is the global voice for agriculture equipment manufacturers representing 6000+ companies around the world.

Our Mission: Advocate for global mechanization for sustainable agriculture, raising awareness of the vital role that agriculture mechanization and its precision agriculture technologies play as our world strives for sustainable global food security.

The Alliance is made up of national and world regional agriculture equipment associations sharing data, gathering information and aligning messaging to better serve our collective member companies and support our Mission. Non-equipment manufacturing stakeholder organizations share our vision and support our efforts through collaboration as Strategic Partners.



AEA
Agricultural Engineers Association



AEM
Association of Equipment Manufacturers



ANSEMAT
Association for Agricultural, Forestry and Landscaping Machinery



AXEMA
Association for Industrial Agricultural Equipment



CAFMA
Argentinian Chamber of Agrimachinery Manufacturers



CAMDA
China Agricultural Machinery Distribution Association



CEMA
European Agricultural Machinery Association



FEDERUNACOMA
Italian Farm Machinery Manufacturers Association



FICCI
Federation of Indian Chambers of Commerce and Industry



JAMMA
Japan Agricultural Machinery Manufacturer's Association



KAMICO
Korean Agricultural Machinery Industry Cooperative



ROSSPETSMAH
Russian Association of Specialized Machinery and Equipment Manufacturers



TARMAKBIR
Turkish Association of Agricultural Machinery & Equipment Manufacturers

AGRIEVOLUTION MEMBERS

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Global Market Data



Global Advocacy



Agrievolution Summits

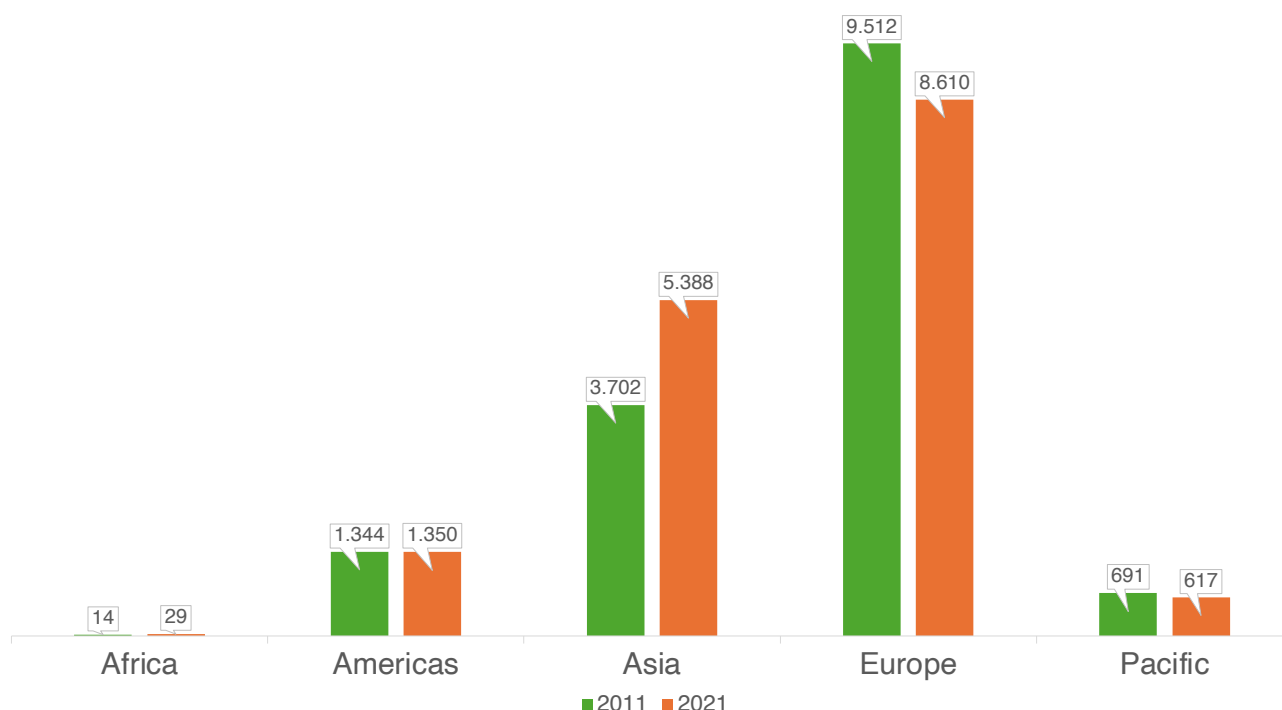


Global Data Exchange

Establishments

Agricultural and forestry machinery manufacturers

Source: INDSTAT Revision 4; available data for 55 countries. No data for Brazil, Argentina and Canada.



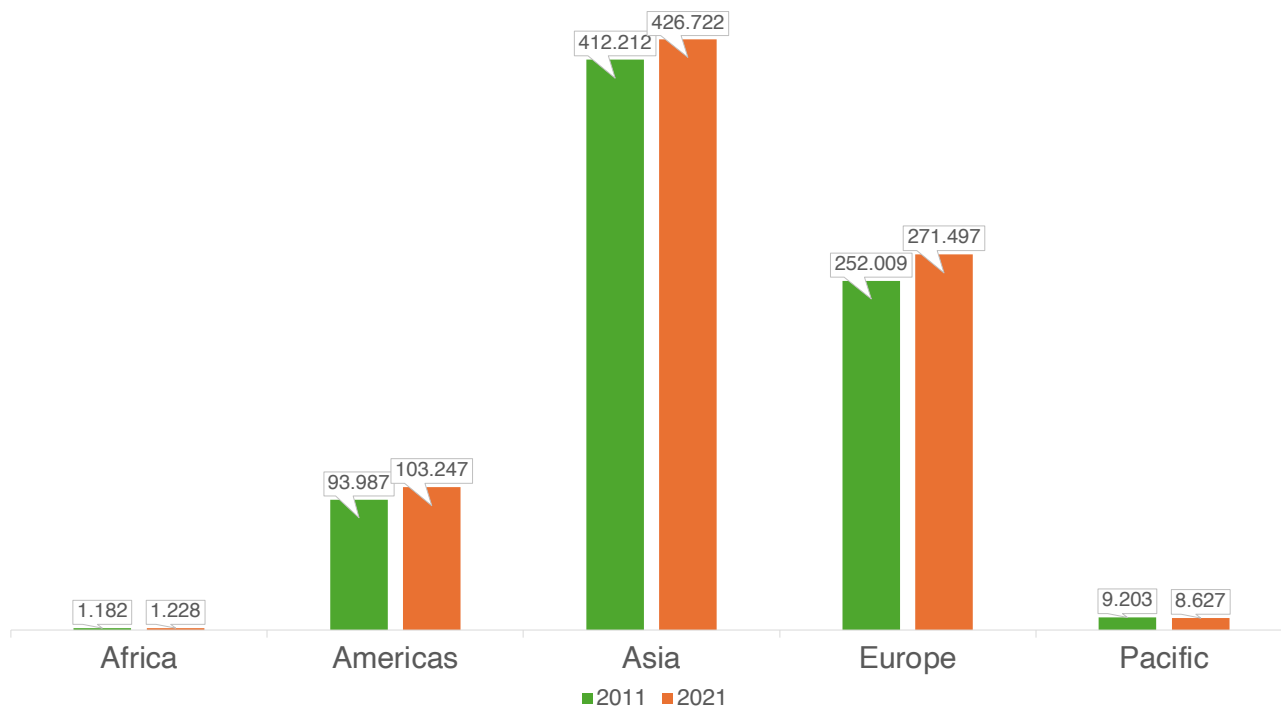
	2011	2021	Countries	Change
Africa	14	29	2	107,1%
Americas	1.344	1.350	6	0,4%
Asia	3.702	5.388	12	45,5%
Europe	9.512	8.610	33	-9,5%
Pacific	691	617	2	-10,7%
	15.263	15.994	55	4,8%

The UNIDO Industrial Statistics (INDSTAT) Revision 4 Database contains disaggregated data on industrial sectors worldwide. It offers a unique possibility for in-depth structural analysis of economies over time. Data comparability over time and across countries has been the main priority when developing and updating this database. The database is organized according to the International Standard Industrial Classification of All Economic Activities (ISIC) Revision 4.

Employees

Agricultural and forestry machinery manufacturers

Source: INDSTAT Revision 4; available data 65 countries. No data for Brazil and Argentina.



	2011	2021	Countries	Change
Africa	1.182	1.228	3	3,9%
Americas	93.987	103.247	8	9,9%
Asia	412.212	426.722	21	3,5%
Europe	252.009	271.497	30	7,7%
Pacific	9.203	8.627	2	-6,3%
	768.593	811.321	64	5,6%

It contains main indicators of industrial statistics such as output, number of employees and number of establishments.

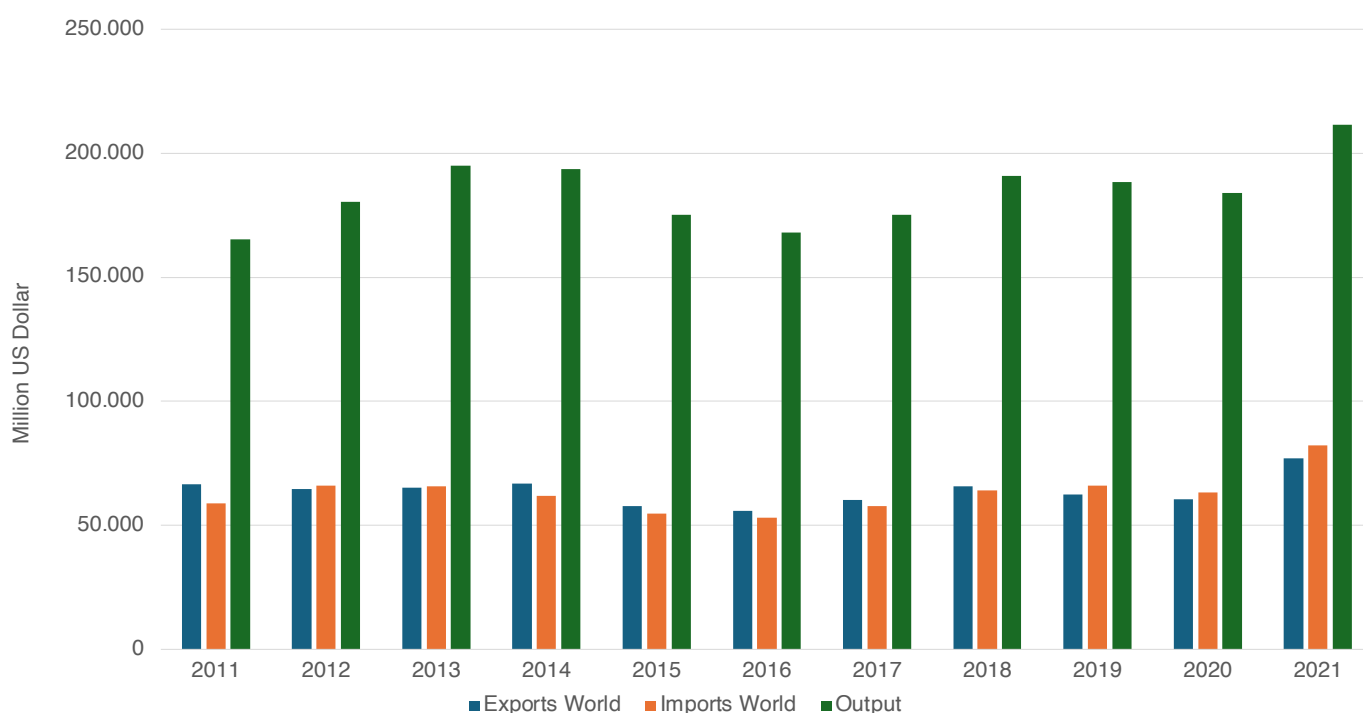
INDSTAT Revision 4 is a database of official statistics, containing data that UNIDO collects directly from national and regional statistical offices, as well as other official sources.

Output, exports and imports

Agricultural and forestry machinery manufacturers

Source: IDSB Revision 4; available data for 111 countries. No data for Argentina. No output data for Brazil

	Exports	Imports	Output
2011	66.412	58.704	165.217
2012	64.678	66.020	180.344
2013	65.095	65.824	194.880
2014	66.792	61.907	193.616
2015	57.720	54.616	175.137
2016	55.742	52.973	167.997
2017	60.285	57.851	175.214
2018	65.599	63.934	190.940
2019	62.451	65.859	188.311
2020	60.453	63.147	183.947
2021	76.997	82.088	211.370



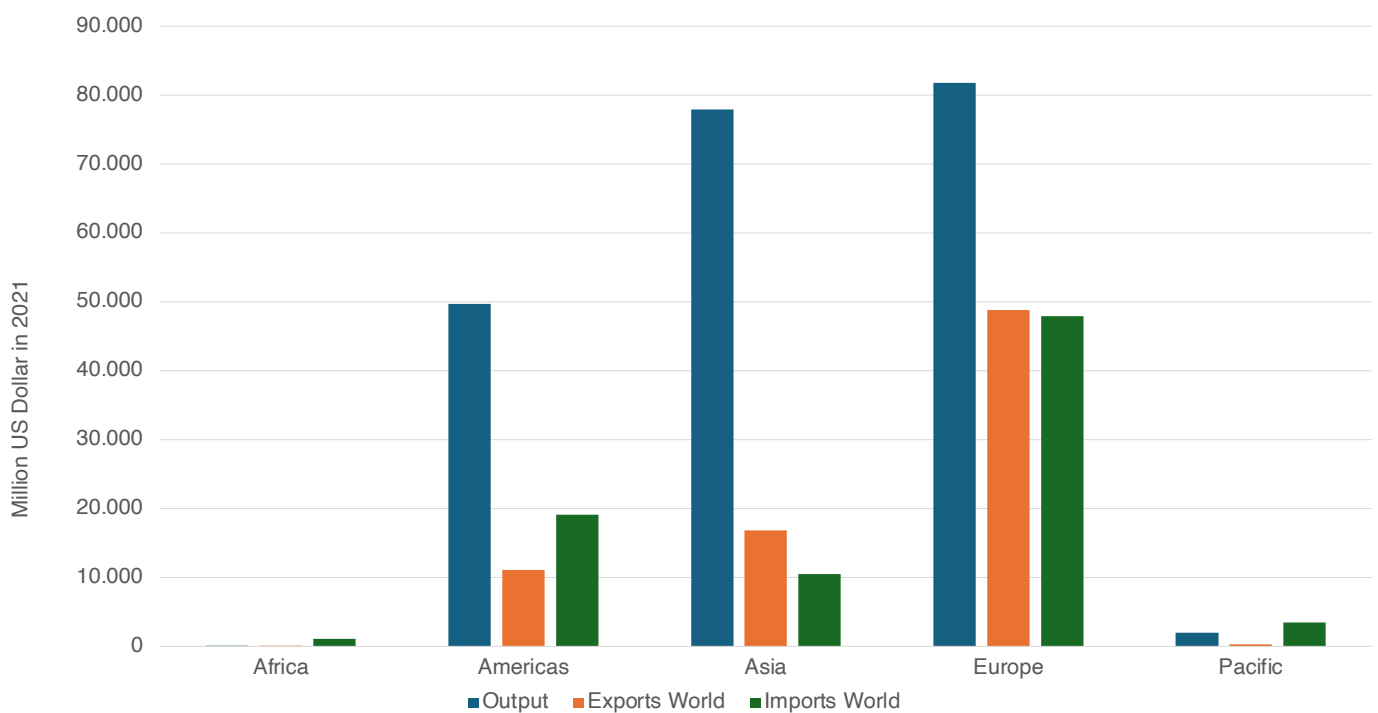
The UNIDO Industrial Demand-Supply Balance Database (ISDB) Revision 4 contains highly detailed data on the manufacturing sector linking production and trade variables. The data are derived from output data as reported in INDSTAT Revision 4 together with UNIDO estimates for ISIC-based international trade data, sourced from the United Nations Commodity Trade Database (Comtrade).

by region (2011-2021)

Agricultural and forestry machinery manufacturers

Source: INDSTAT Revision 4; available data 65 countries. No data for Brazil and Argentina.

	Africa			Americas			Asia			Europe			Pacific		
	Exports	Imports	Output	Exports	Imports	Output	Exports	Imports	Output	Exports	Imports	Output	Exports	Imports	Output
2011	47	943	17	12.694	12.652	37.445	7.920	5.374	55.681	45.425	37.516	69.976	326	2.219	2.097
2012	20	1.123	21	14.208	14.297	46.970	8.607	8.104	59.687	41.539	40.001	71.671	304	2.494	1.994
2013	38	1.393	20	13.423	14.987	52.012	8.763	6.008	66.299	42.575	41.454	74.392	295	1.982	2.157
2014	32	1.350	34	12.021	14.801	52.345	9.616	6.046	70.928	44.808	37.506	68.394	315	2.205	1.915
2015	30	1.358	64	9.989	13.341	43.786	9.650	6.674	72.527	37.766	31.256	57.318	286	1.986	1.442
2016	22	1.170	51	8.816	11.903	35.800	9.430	6.358	73.930	37.190	31.462	56.797	284	2.080	1.420
2017	29	895	55	10.126	12.862	32.971	10.361	6.345	77.413	39.474	35.145	63.293	295	2.605	1.482
2018	19	930	121	10.673	14.633	41.172	11.189	6.498	76.843	43.402	39.386	71.403	316	2.487	1.401
2019	21	845	179	9.782	14.304	43.318	11.507	10.557	76.392	40.850	37.929	67.035	291	2.224	1.387
2020	21	835	18	8.907	14.013	41.191	12.381	8.811	77.401	38.865	37.207	63.754	280	2.280	1.583
2021	19	1.079	9	11.053	19.141	49.690	16.817	10.526	77.914	48.773	47.881	81.800	335	3.462	1.956



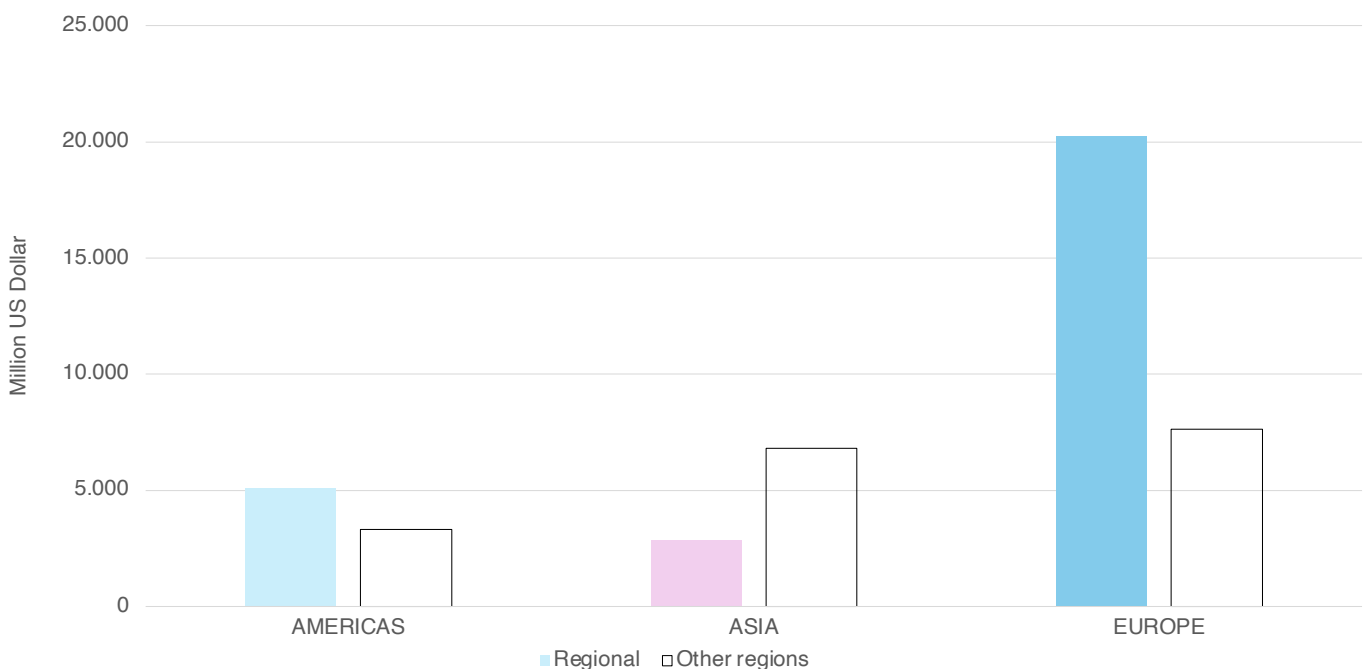
IIDSB Revision 4 contains time series data for four variables: domestic output, total imports, total exports and apparent consumption (= output + imports - exports).

Exports in 2023

Agricultural and forestry machinery manufacturers

Source: ITC Codes 8701 (3); 8716 (1); 8432 (6); 8424 (1); 8433 (7).

	AMERICAS		ASIA		EUROPE	
	Regional	World	Regional	World	Regional	World
Fertilizing	136	154	9	31	338	422
Harvesting	1.311	2.060	742	983	5.114	7.433
Sowing	351	469	122	189	873	1.100
Sprayers	647	1.100	603	1.500	976	1.300
Tillage	291	424	258	817	2.110	2.585
Tractors	2.263	4.092	1.134	6.087	10.217	14.344
Trailers	108	121	5	29	620	660
	5.107	8.420	2.873	9.636	20.248	27.844



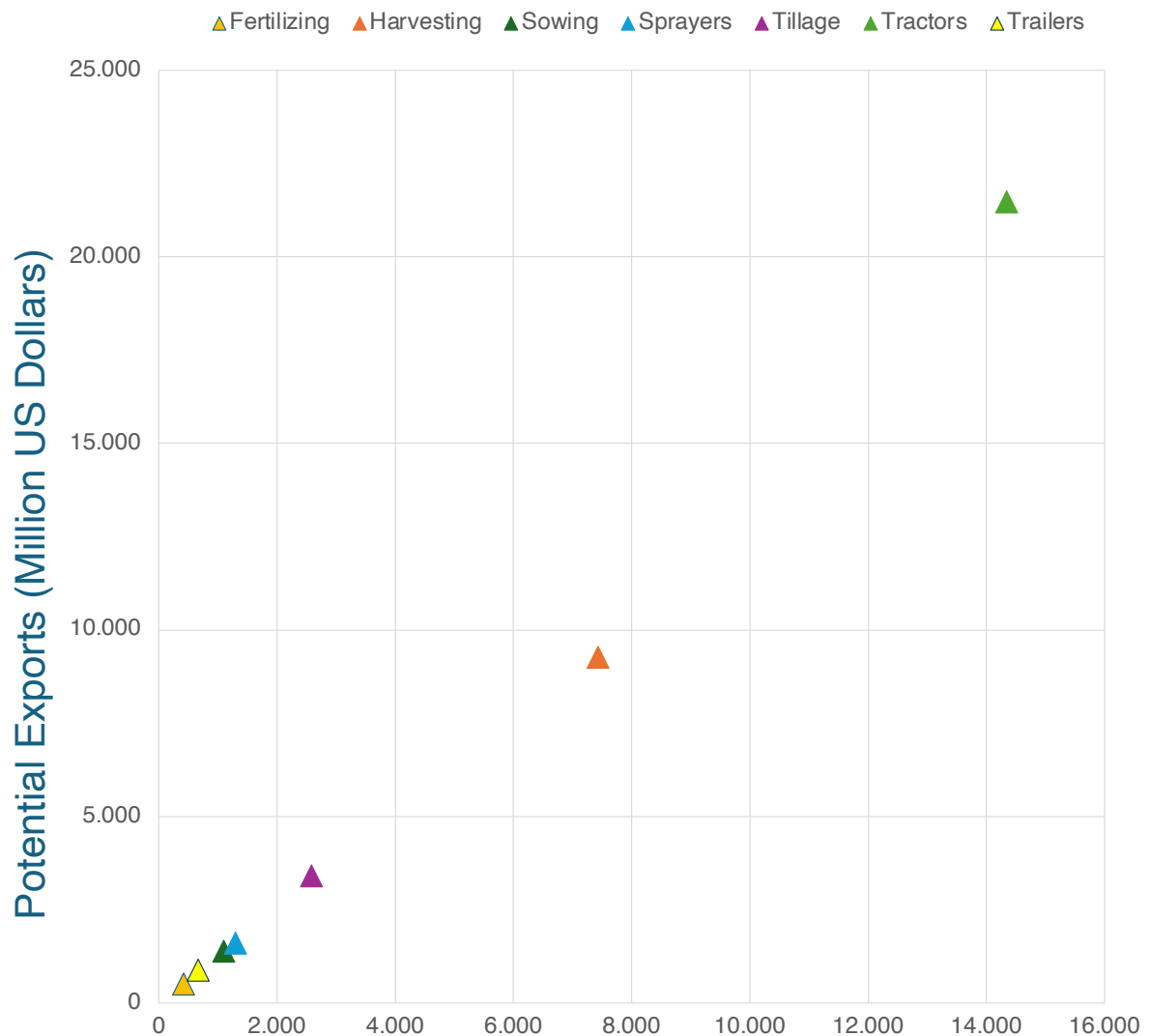
The value of actual exports is calculated as an arithmetic average of direct and mirror data of reliable reporters over the past five years. Actual exports to a region, including to the world as a whole, only include exports to markets where the country has export potential. At an aggregate level, actual exports can therefore be equivalent to or lower than export values recorded in other trade databases, such as the ITC Trade Map.

Actual and potential exports

Agricultural and forestry machinery manufacturers

Source: ITC Codes 8701 (3); 8716 (1); 8432 (6); 8424 (1); 8433 (7).

	Fertilizing	Harvesting	Sowing	Sprayers	Tillage	Tractors	Trailers
EUROPE							
Actual exports	422	7.433	1.100	1.300	2.585	14.344	660
Export potential	504	9.271	1.400	1.600	3.415	21.473	882



Actual exports in 2023 (Million US Dollars)

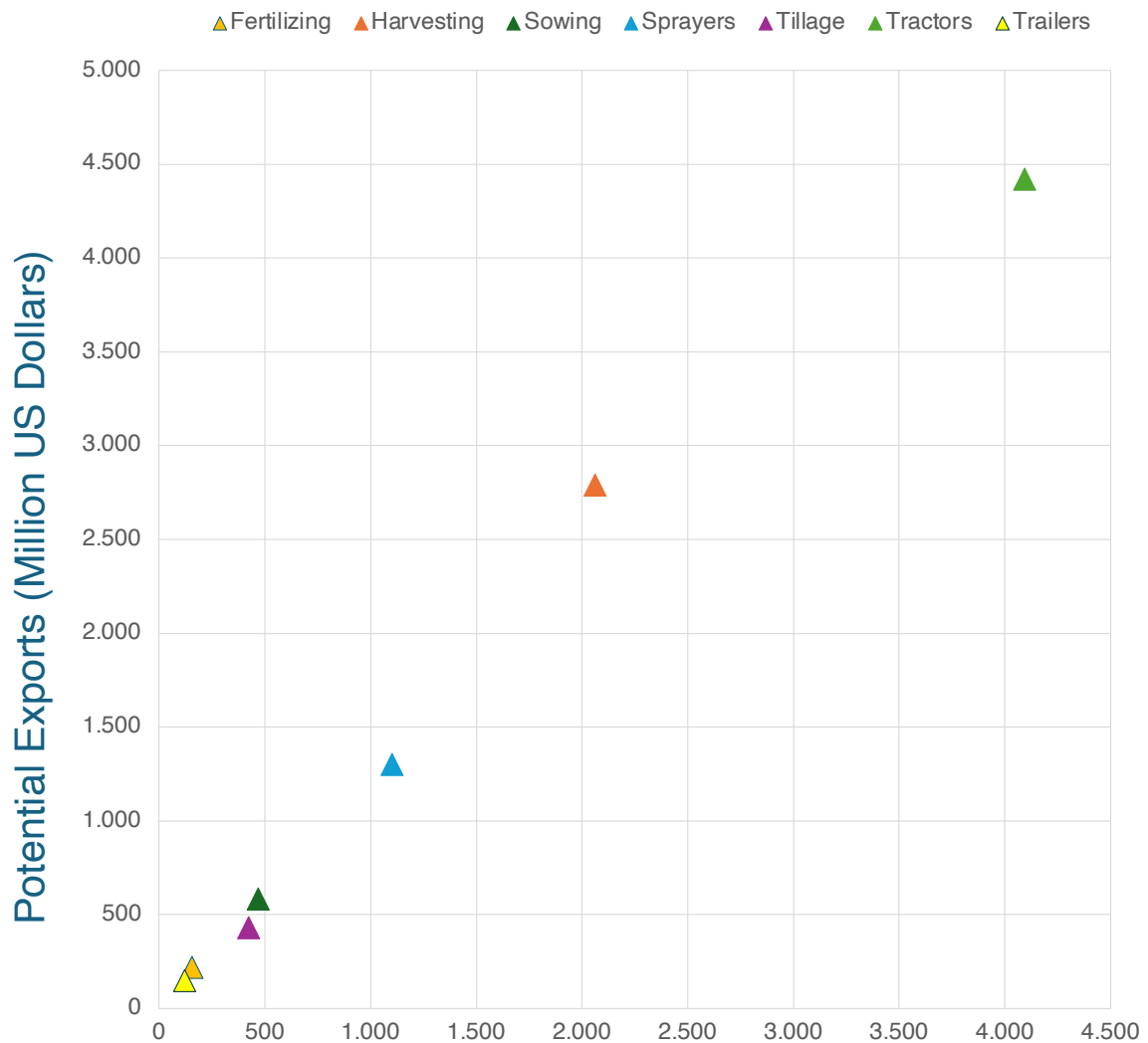
Potential export value of product k supplied by country i to market j , in dollars, is calculated as supply \times demand (corrected for market access) \times bilateral ease of trade. Supply and demand are projected into the future based on GDP and population forecasts, demand elasticities and forward-looking tariffs. The estimated dollar value serves as a benchmark for comparison with actual exports and should not be interpreted as a ceiling value. In reality, the actual trade value may be below or above the potential value.

Actual and potential exports

Agricultural and forestry machinery manufacturers

Source: ITC Codes 8701 (3); 8716 (1); 8432 (6); 8424 (1); 8433 (7).

	Fertilizing	Harvesting	Sowing	Sprayers	Tillage	Tractors	Trailers
AMERICAS							
Actual exports	154	2.060	469	1.100	424	4.092	121
Export potential	221	2.791	583	1.300	432	4.420	151



Actual exports in 2023 (Million US Dollars)

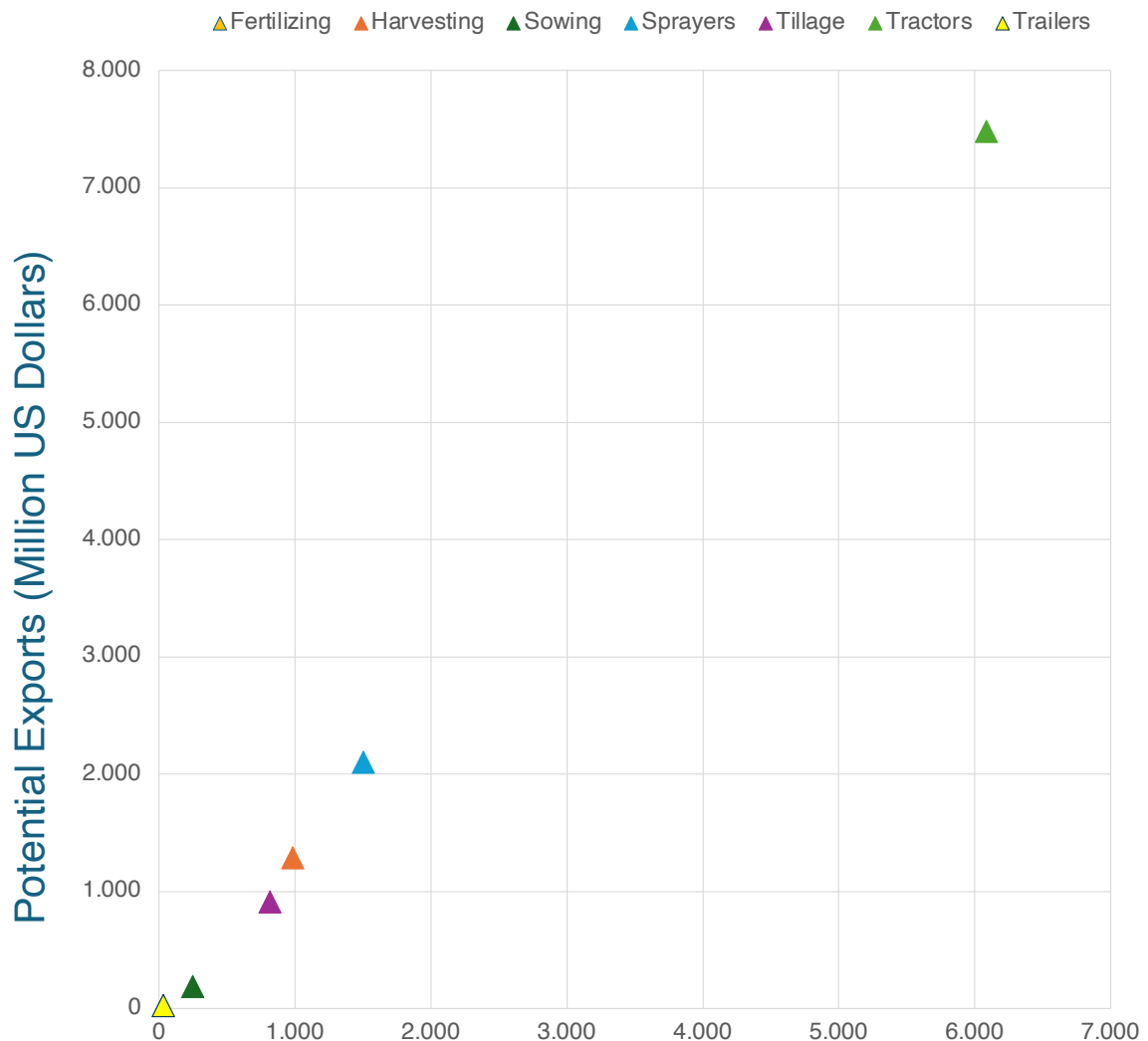
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Actual and potential exports

Agricultural and forestry machinery manufacturers

Source: ITC Codes 8701 (3); 8716 (1); 8432 (6); 8424 (1); 8433 (7).

	Fertilizing	Harvesting	Sowing	Sprayers	Tillage	Tractors	Trailers
ASIA							
Actual exports	31	983	189	1.500	817	6.087	29
Export potential	24	1.287	250	2.100	909	7.479	26



Actual exports in 2023 (Million US Dollars)

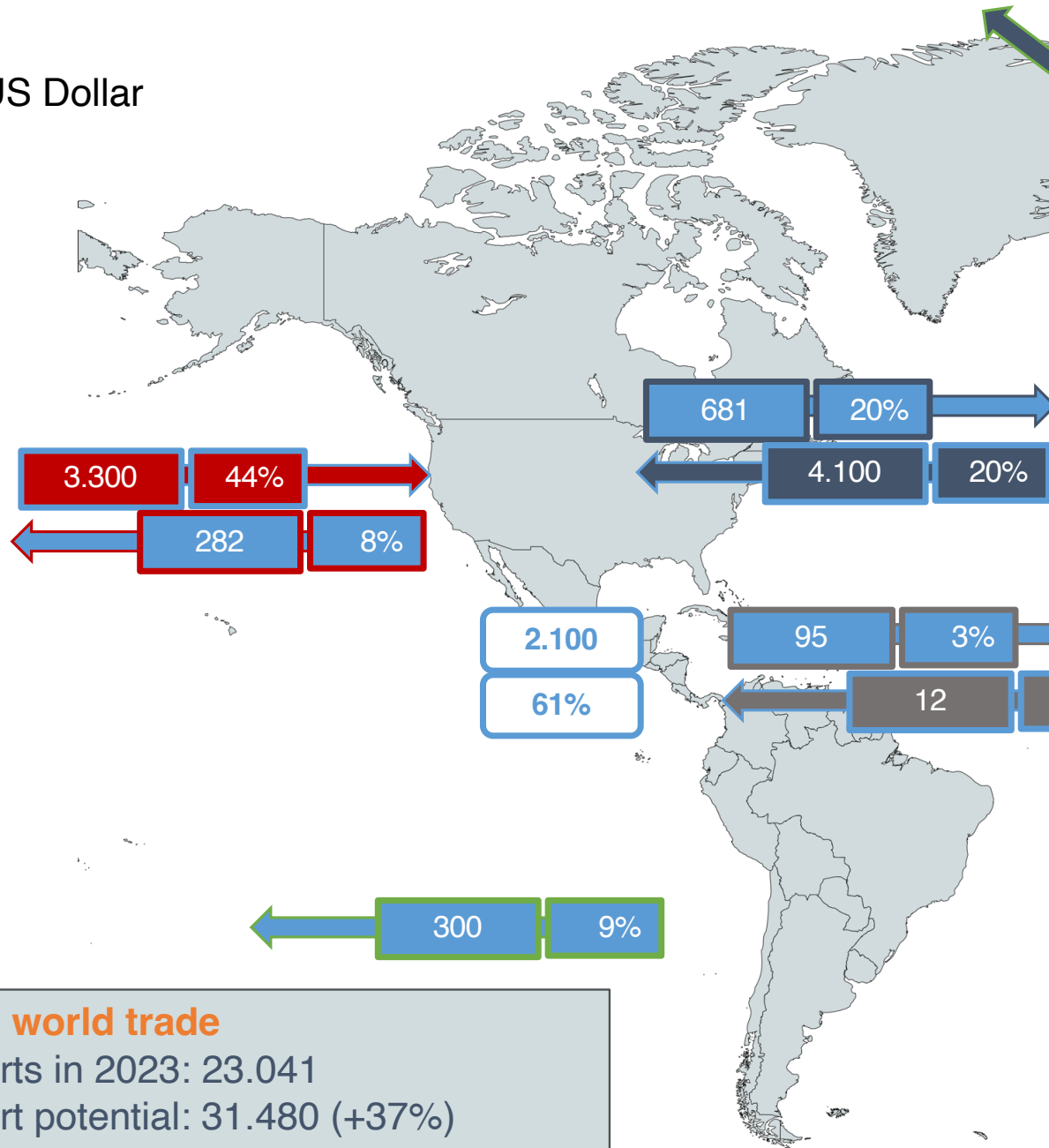
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Potential exports by region

Agricultural tractors

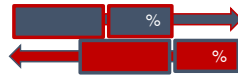
Source: ITC Code 8701Xb

Million US Dollar

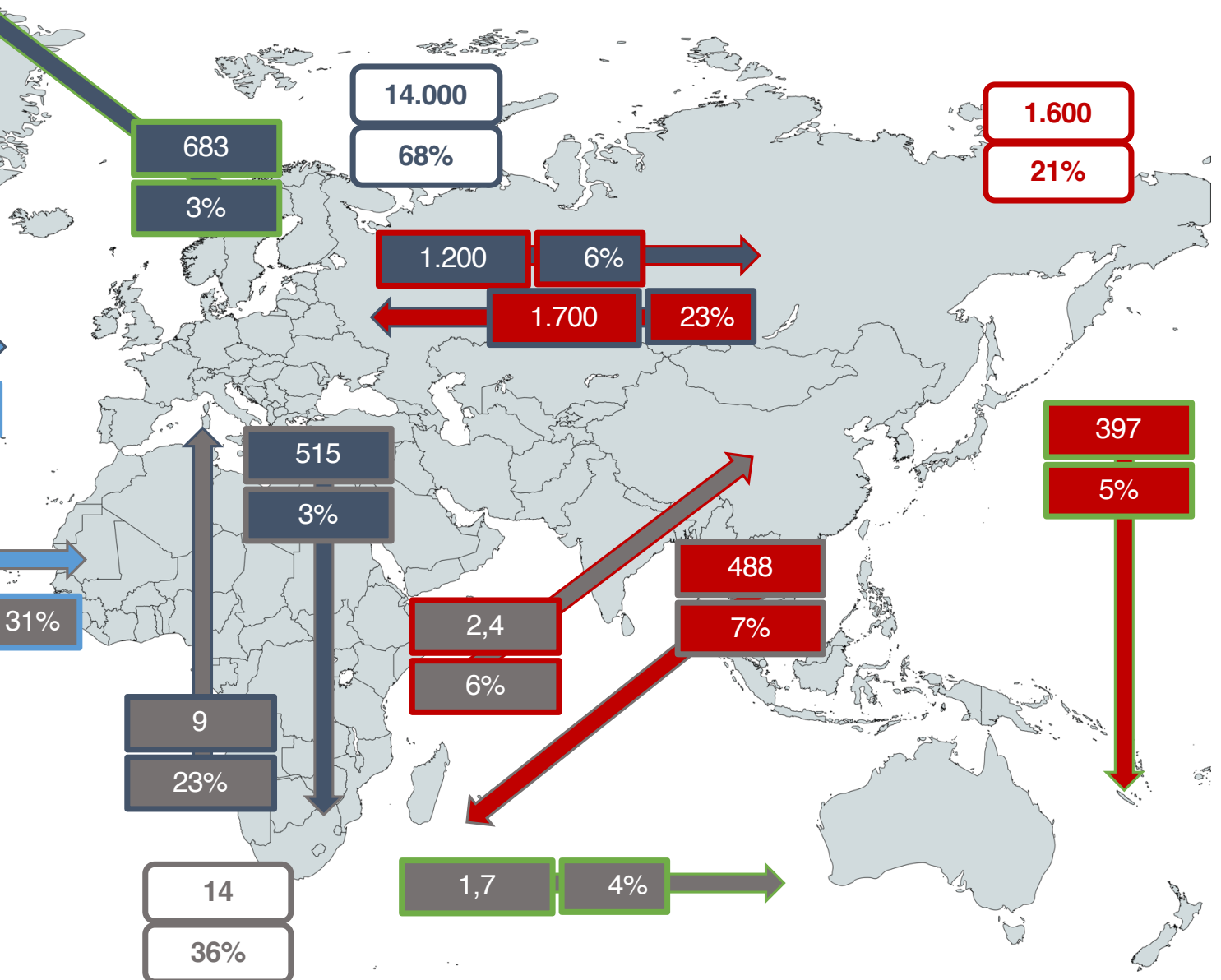


Key

 Potential regional exports
% % of total potential exports



% Outbound and inbound potential exports
% % of total potential exports



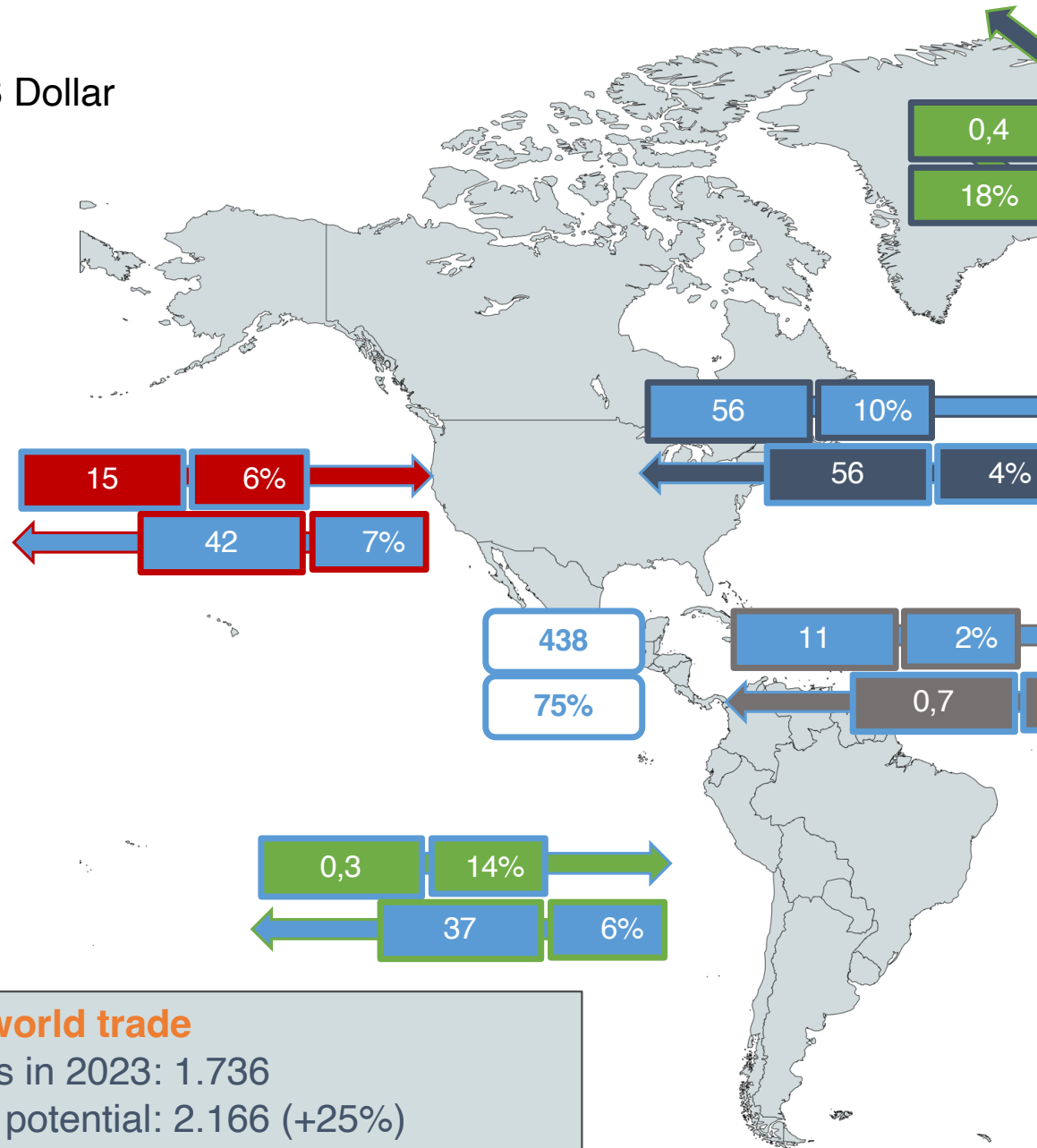
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Potential exports by region

Seeders

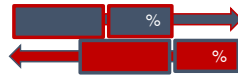
Source: ITC Code 8432Xa

Million US Dollar

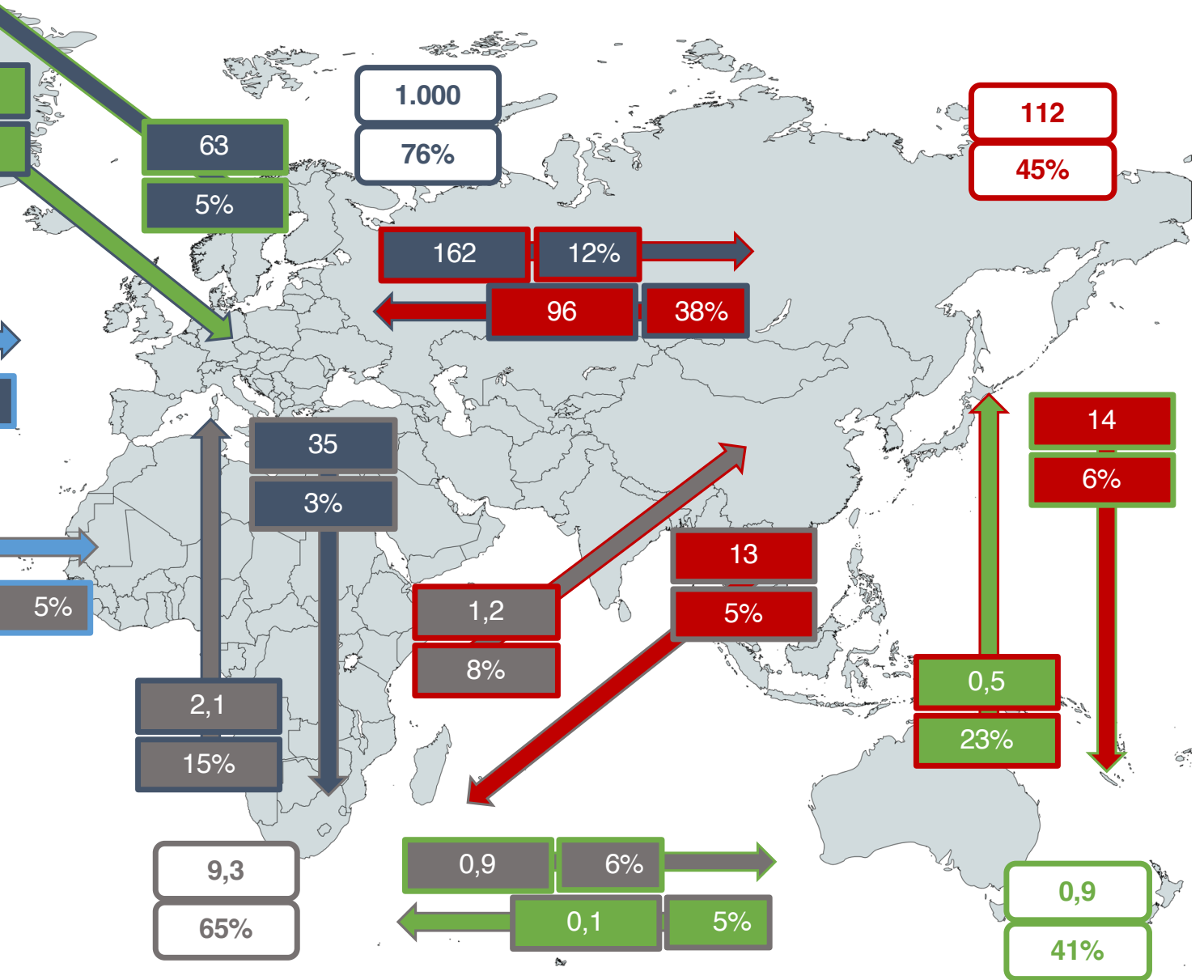


Key

 Potential regional exports
% % of total potential exports



 Outbound and inbound potential exports
% % of total potential exports



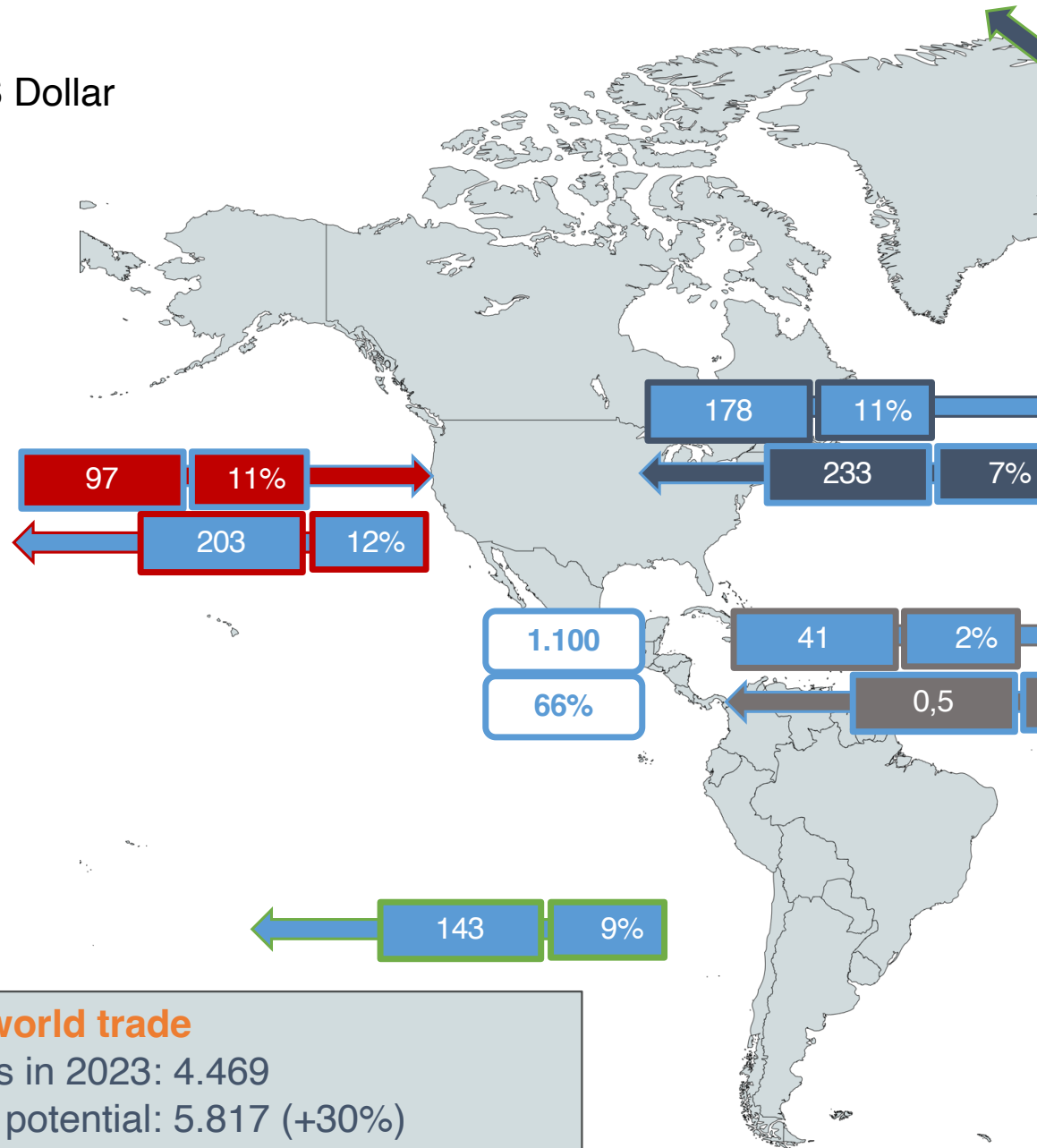
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Potential exports by region

Combine harvesters

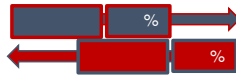
Source: ITC Code 843351

Million US Dollar

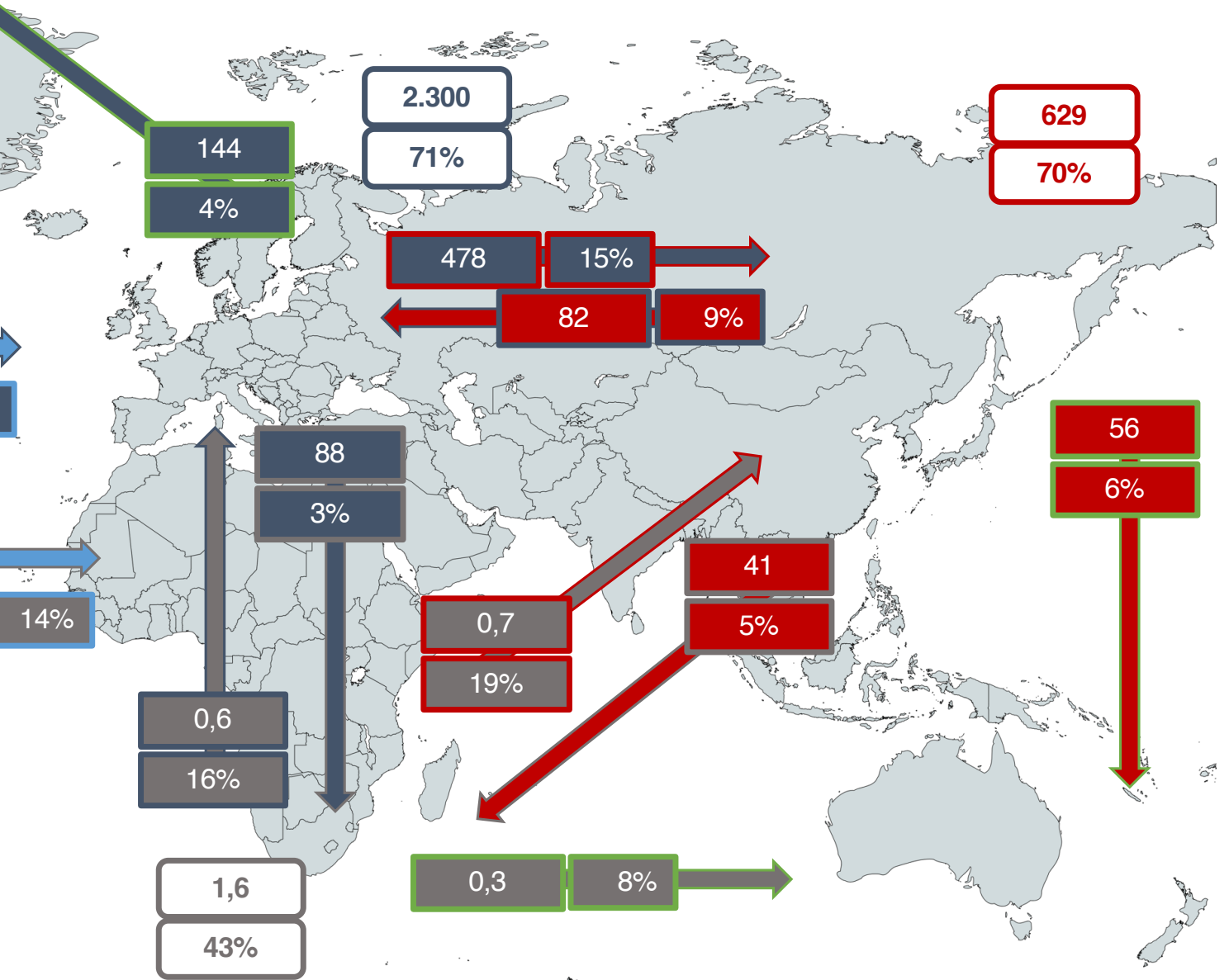


Key

 Potential regional exports
% % of total potential exports



 Outbound and inbound potential exports
% % of total potential exports



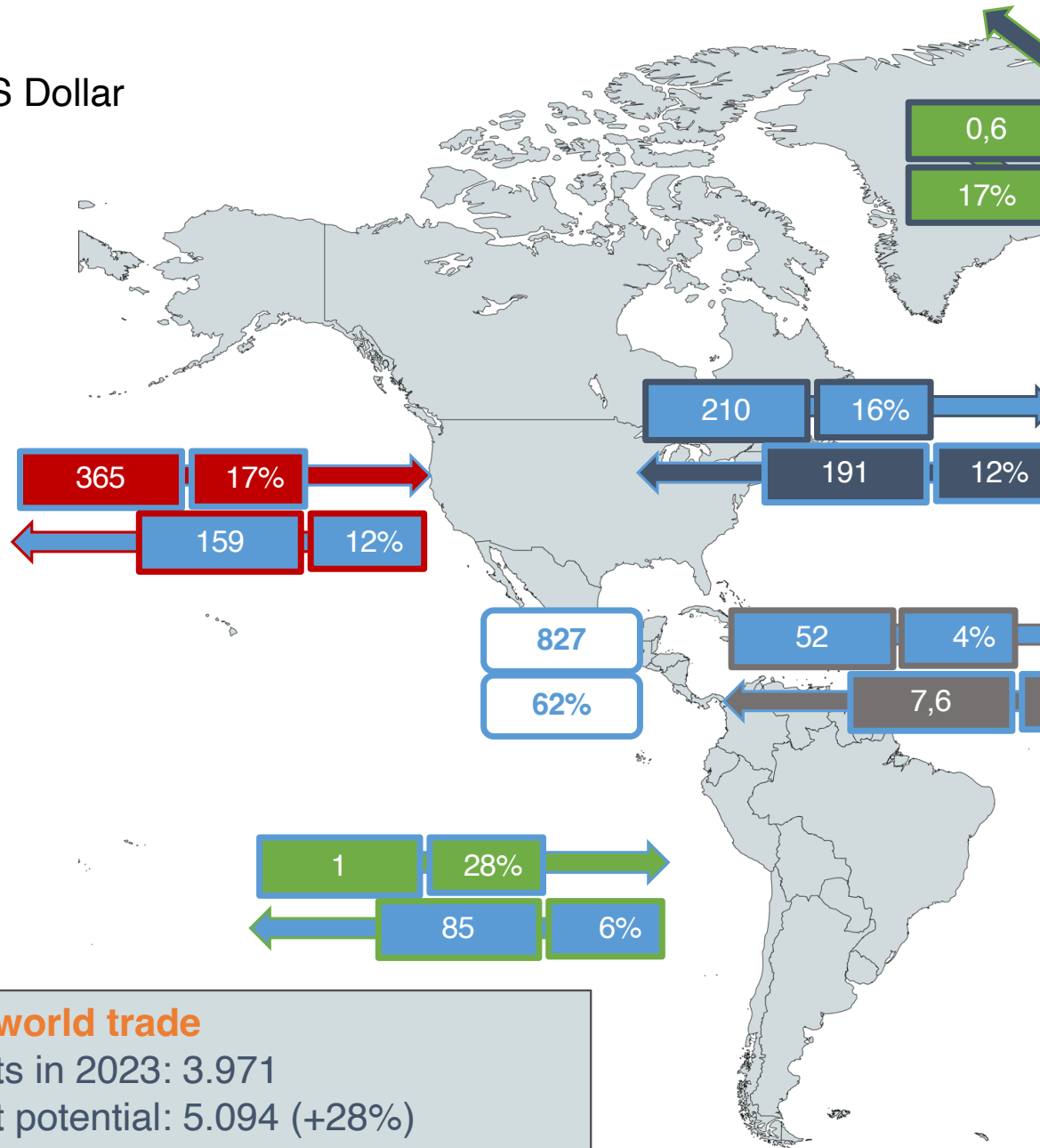
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Potential exports by region

Agricultural sprayers

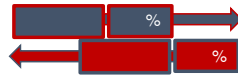
Source: ITC Code 8424XX

Million US Dollar

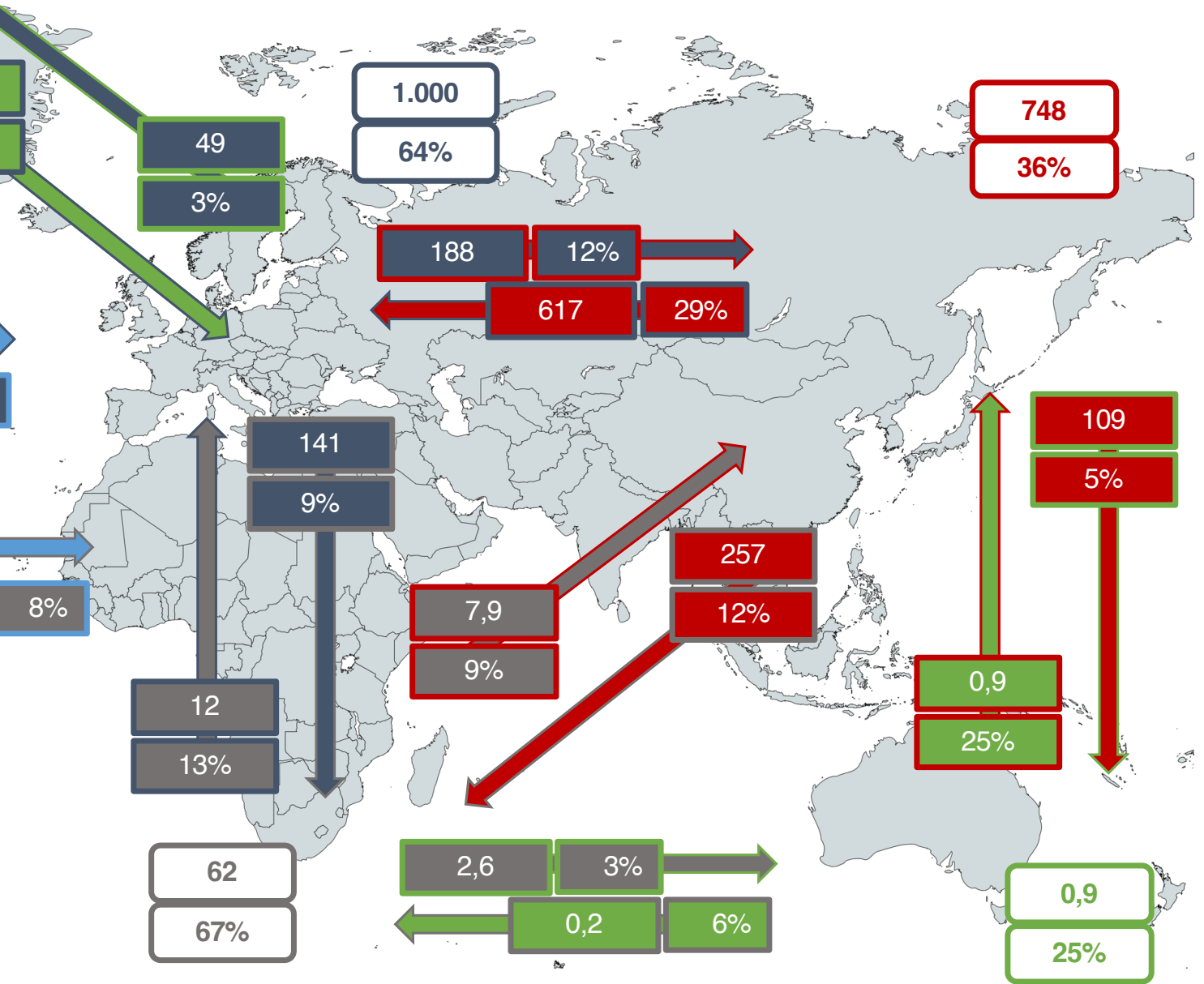


Key

 Potential regional exports
% % of total potential exports



 Outbound and inbound potential exports
% % of total potential exports



Potential export value of product k supplied by country i to market j, in dollars, is calculated as supply × demand (corrected for market access) × bilateral ease of trade. Supply and demand are projected into the future based on GDP and population forecasts, demand elasticities and forward-looking tariffs. The estimated dollar value serves as a benchmark for comparison with actual exports and should not be interpreted as a ceiling value. In reality, the actual trade value may be below or above the potential value.

Potential Machinery Demand

CEREALS

Source: ITC; Codes: Cereals (exc. Wheat and rice); Wheat; Rice
FAO; Codes: Cereals (See page 28)


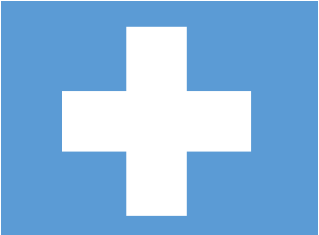
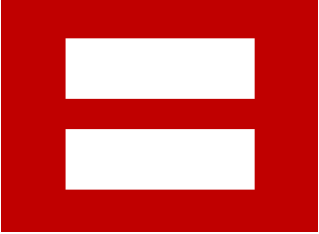


			SHARE
EUROPE	Production (2022)	88.300	10,3%
	Exports (2023)	51.811	35%
	EPI	60.463	31%
AMERICAS	Production (2022)	128.400	14,9%
	Exports (2023)	58.886	40%
	EPI	75.178	39%
ASIA	Production (2022)	567.100	66%
	Exports (2023)	26.891	18%
	EPI	41.045	21%
AFRICA	Production (2022)	61.900	7,2%
	Exports (2023)	1.633	1%
	EPI	2.371	1%
PACIFIC	Production (2022)	9.600	1,5%
	Exports (2023)	9.069	6%
	EPI	15.832	8%

EPI = EXPORT POTENTIAL INDICATOR

Million US Dollar

Potential export value (EPI) of product k supplied by country i to market j, in dollars, is calculated as supply × demand (corrected for market access) × bilateral ease of trade. Supply and demand are projected into the future based on GDP and population forecasts, demand elasticities and forward-looking tariffs. The estimated dollar value serves as a benchmark for comparison with actual exports and should not be interpreted as a ceiling value. In reality, the actual trade value may be below or above the potential value.

The potential machinery demand (PMD) is an estimated indicator for a single region based on the production and cultivated area trend, potential exports (EPI), apparent consumption and exporter rank, that offers a simple estimation (non-quantitative) of expected growth, decline or stagnation of the agriculture mechanization demand.

2022 / 2011	Potential	Exporter	PMD
Production (tons) +12% Area (has.) -2%	As importer +3.631 As exporter +8.652	Americas Asia Africa Pacific Europe	
Production (tons) +24% Area (has.) +10%	As importer +5.236 As exporter +16.292	Americas Asia Europe Africa Pacific	
Production (tons) +15% Area (has.) +0%	As importer + 27.070 As exporter +14.154	Europe Americas Pacific Asia Africa	
Production (tons) +32% Area (has.) +12%	As importer +10.439 As exporter +738	Asia Americas Europe Pacific Africa	
Production (tons) +40% Area (has.) +2%	As importer +223 As exporter +6.763	Asia Pacific Europe Americas Africa	

Million US Dollar

Potential Machinery Demand

FRUITS

Source: ITC; Codes: Fruits

FAO; Codes: Fruits Primary (See page 28)



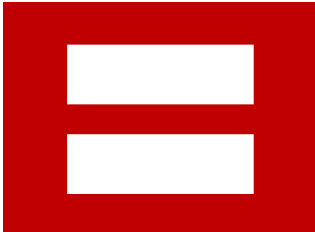
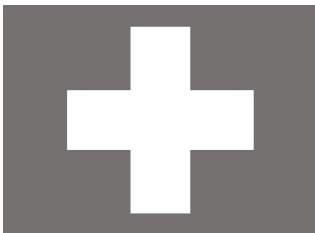

			SHARE
EUROPE	Production (2022)	60.800	12%
	Exports (2023)	28.807	26%
	EPI	40.411	23%
AMERICAS	Production (2022)	65.300	13%
	Exports (2023)	41.136	38%
	EPI	63.649	36%
ASIA	Production (2022)	312.600	64%
	Exports (2023)	25.777	24%
	EPI	51.775	29%
AFRICA	Production (2022)	44.600	9%
	Exports (2023)	9.975	9%
	EPI	15.050	9%
PACIFIC	Production (2022)	5.700	1%
	Exports (2023)	3.596	3%
	EPI	5.745	3%

Million US Dollar

EPI = EXPORT POTENTIAL INDICATOR

Potential export value (EPI) of product k supplied by country i to market j, in dollars, is calculated as supply × demand (corrected for market access) × bilateral ease of trade. Supply and demand are projected into the future based on GDP and population forecasts, demand elasticities and forward-looking tariffs. The estimated dollar value serves as a benchmark for comparison with actual exports and should not be interpreted as a ceiling value. In reality, the actual trade value may be below or above the potential value.

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2022 / 2011	Potential	Exporter	PMD
Production (tons) +4% Area (has.) -8%	As importer +22.426 As exporter +11.604	Asia Americas Europe Africa Pacific	
Production (tons) +4% Area (has.) +1%	As importer +12.171 As exporter +22.513	Americas Asia Europe Africa Pacific	
Production (tons) +28% Area (has.) +9%	As importer +30.742 As exporter +25.998	Asia Americas Europe Africa Pacific	
Production (tons) +44% Area (has.) +31%	As importer +1.670 As exporter +5.705	Asia Europe Africa Americas Pacific	
Production (tons) +9% Area (has.) -1%	As importer +330 As exporter +2.149	Europe Asia Pacific Africa Americas	

Million US Dollar

Potential Machinery Demand

VEGETABLES

Source: ITC; Codes: Vegetables

FAO; Codes: Vegetables Primary (See page 28)






			SHARE
EUROPE	Production (2022)	50.400	9%
	Exports (2023)	27.084	43%
	EPI	38.131	43%
AMERICAS	Production (2022)	41.200	7%
	Exports (2023)	16.336	26%
	EPI	22.606	25%
ASIA	Production (2022)	433.800	77%
	Exports (2023)	15.975	25%
	EPI	23.634	26%
AFRICA	Production (2022)	36.900	6,5%
	Exports (2023)	3.303	5%
	EPI	4.391	5%
PACIFIC	Production (2022)	2.500	0,5%
	Exports (2023)	519	1%
	EPI	468	1%

Million US Dollar

EPI = EXPORT POTENTIAL INDICATOR

Potential export value (EPI) of product k supplied by country i to market j, in dollars, is calculated as supply × demand (corrected for market access) × bilateral ease of trade. Supply and demand are projected into the future based on GDP and population forecasts, demand elasticities and forward-looking tariffs. The estimated dollar value serves as a benchmark for comparison with actual exports and should not be interpreted as a ceiling value. In reality, the actual trade value may be below or above the potential value.

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2022 / 2011	Potential	Exporter	PMD
Production (tons) -14% Area (has.) -25%	As importer +11.207 As exporter +11.047	Europe Asia Americas Pacific Africa	
Production (tons) +0% Area (has.) -7%	As importer +6.457 As exporter +6.270	Americas Asia Europe Africa Pacific	
Production (tons) +25% Area (has.) +12%	As importer +7.164 As exporter +7.659	Asia Europe Americas Africa Pacific	
Production (tons) +34% Area (has.) +34%	As importer +1.045 As exporter +1.088	Africa Asia Europe Americas Pacific	
Production (tons) +4% Area (has.) -2%	As importer +140 As exporter -51	Asia Europe Americas Africa Pacific	

Million US Dollar

Potential Machinery Demand

OILCROPS

Source: ITC; Codes: Vegetable oils

FAO; Codes: Oilcrops primary (See page 28)






			SHARE
EUROPE	Production (2022)	45.900	12%
	Exports (2023)	37.835	33%
	EPI	45.632	28%
AMERICAS	Production (2022)	133.200	36%
	Exports (2023)	19.012	17%
	EPI	26.615	17%
ASIA	Production (2022)	169.100	45%
	Exports (2023)	54.151	47%
	EPI	82.917	52%
AFRICA	Production (2022)	17.400	3%
	Exports (2023)	2.937	3%
	EPI	4.593	9%
PACIFIC	Production (2022)	6.300	2%
	Exports (2023)	1.250	1%
	EPI	1.077	1%

Million US Dollar

EPI = EXPORT POTENTIAL INDICATOR

Potential export value (EPI) of product k supplied by country i to market j, in dollars, is calculated as supply × demand (corrected for market access) × bilateral ease of trade. Supply and demand are projected into the future based on GDP and population forecasts, demand elasticities and forward-looking tariffs. The estimated dollar value serves as a benchmark for comparison with actual exports and should not be interpreted as a ceiling value. In reality, the actual trade value may be below or above the potential value.

The potential machinery demand (PMD) is an estimated indicator for a single region based on the production and cultivated area trend, potential exports (EPI), apparent consumption and exporter rank, that offers a simple estimation (non-quantitative) of expected growth, decline or stagnation of the agriculture mechanization demand.

2022 / 2011	Potential	Exporter	PMD
Production (tons) +34% Area (has.) +27%	As importer +5.607 As exporter +7.797	Asia Africa Americas Europe Pacific	
Production (tons) +33% Area (has.) +23%	As importer +4.728 As exporter +7.603	Asia Europe Americas Africa Pacific	
Production (tons) +30% Area (has.) +8%	As importer +28.609 As exporter +28.766	Asia Europe Americas Africa Pacific	
Production (tons) +50% Area (has.) +49%	As importer +6.144 As exporter +1.656	Asia Americas Africa Europe Pacific	
Production (tons) +103% Area (has.) +35%	As importer +561 As exporter -173	Asia Europe Americas Africa Pacific	

Million US Dollar

FAO - Definitions

CROPS

Cereals, primary	<ul style="list-style-type: none"> Barley Buckwheat Canary seed Cereals n.e.c. Fonio Maize (corn) Millet Mixed grain Oats Quinoa Rice Rye Sorghum Triticale Wheat 	Vegetables Primary	<ul style="list-style-type: none"> Artichokes Asparagus Broad beans and horse beans, green Cabbages Carrots and turnips Cassava leaves Cauliflowers and broccoli Chillies and peppers, green Cucumbers and gherkins Eggplants (aubergines) Green corn (maize) Green garlic Leeks and other alliaceous vegetables Lettuce and chicory Mushrooms and truffles Okra Onions and shallots, dry (excluding dehydrated) Onions and shallots, green Other beans, green Other vegetables, fresh n.e.c. Peas, green Pumpkins, squash and gourds Spinach String beans Tomatoes
Fruit Primary	<ul style="list-style-type: none"> Apples Apricots Avocados Bananas Blueberries Cantaloupes and other melons Cashewapple Cherries Cranberries Currants Dates Figs Gooseberries Grapes Kiwi fruit Lemons and limes Locust beans (carobs) Mangoes, guavas and mangosteens Oranges Other berries and fruits Other citrus fruit, n.e.c. Other fruits, n.e.c. Other pome fruits Other stone fruits Other tropical fruits, n.e.c. Papayas Peaches and nectarines Pears Persimmons Pineapples Plantains and cooking bananas Plums and sloes Pomelos and grapefruits Quinces Raspberries Sour cherries Strawberries Tangerines, mandarins, clementines Watermelons 	Oilcrops Primary	<ul style="list-style-type: none"> Castor oil seeds Coconuts, in shell Groundnuts, excluding shelled Hempseed Jobba seeds Kapok fruit Karite nuts (sheanuts) Linseed Melonseed Mustard seed Oil palm fruit Olives Other oil seeds, n.e.c. Poppy seed Rape or colza seed Safflower seed Seed cotton, unginning Sesame seed Soya beans Sunflower seed Tallowtree seeds Tung nuts



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