FEDER UNACOMA

Federazione Nazionale Costruttori Macchine per l'Agricoltura

AGRIEVOLUTION

12 November 2013

AGRICULTURAL SITUATION
Year 2012/2013

Decreasing agricultural income

– **First half 2013 Value Added in agriculture** **-1.3%**

– **2012 Agricultural income per worker** **-1.1%**

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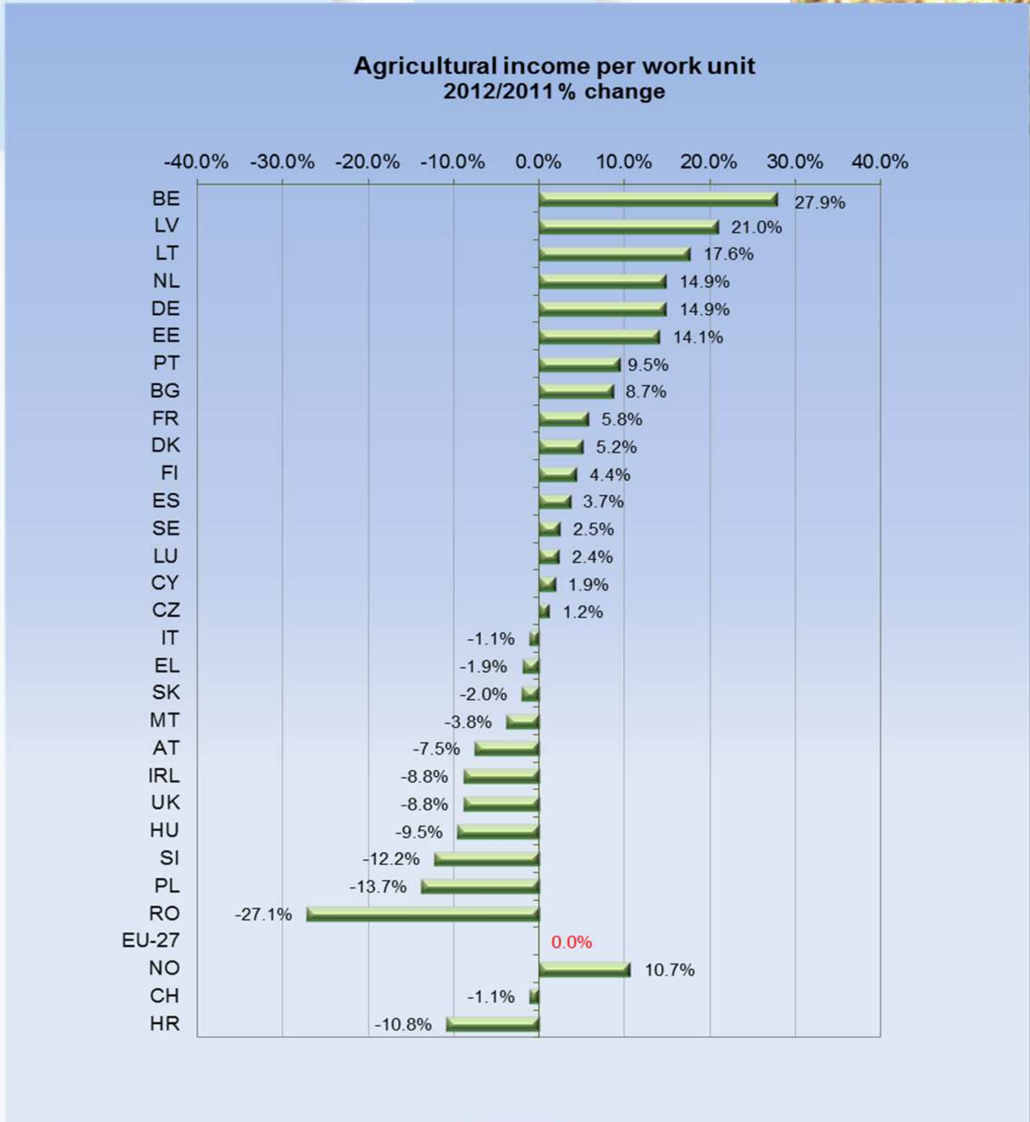
AGRICULTURAL SITUATION
Year 2012/2013



Source: ISTAT

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AGRICULTURAL SITUATION
Year 2012/2013

2012 agricultural output prices → +6.1%

II Quarter 2013

Apr-13 Mar-13	May-13 Apr-13	Jun-13 May-13	II Q -13 I Q-13	Apr-13 Apr-12	May-13 May-12	Jun-13 Jun-12	II Q-13 II Q-12
-2.9	+3.2	+3.7	-0.8	+6,4	+11.4	+11.5	+9.9

Source: ISTAT

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AGRICULTURAL SITUATION
Year 2012/2013

Past harvest results

National production of winter cereals

	2012		2013*		Area (ha) 13/12 %	Prod. (t) 13/12 %
	Area (ha)	Production (t)	Area (ha)	Production (t)		
Durum wheat	1,303,823	4,181,292	1,080,837	3,710,634	**-17.1%**	**-11.3%**
Soft wheat	617,658	3,409,499	601,177	2,999,667	**-2.7%**	**-12.0%**
Barley	267,839	911,373	274,106	927,040	**2.3%**	**1.7%**
Oats	123,047	n.a.	121,887	n.a.	**-0.9%**	**-**
Other	18,028	n.a.	18,757	n.a.	**4.0%**	**-**
Total	**2,330,395**	**8.502.164****	**2,096,764**	**7.637.341****	**-10.0%**	**-10.2%**

Source: AGRIT

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AGRICULTURAL SITUATION
Year 2012/2013

Past harvest results

National production of fresh fruit (000t)			
	2012	2013(1)	% Chg.
Fresh fruits(2)	**7,482**	**7,814**	**4.4%**
- apples	1,939	2,148	10.8%
- grapes	1,057	1,050	-0.7%
- nectarines	871	851	-2.3%
- pears	650	741	14.0%
- peaches	659	648	-1.7%
- kiwi	401	421	5.0%
- percoches	94	89	-5.3%
- other	1,812	1,867	3.0%

(1) estimates
(2) excluding citrus

Source: ISMEA

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ITALIAN AGRICULTURE STRUCTURAL CHANGE

Number of farms - 2010 and 2000			% change
	2010	**2000**	**2010/2000**
North-West	145,243	220,145	-34.0
North-East	251,859	367,052	-31.4
Centre	252,012	423,085	-40.4
South	691,281	929,514	-25.6
Islands	280,489	456,478	-38.6
ITALY	**1,620,884**	**2,396,274**	**-32.4**

Source: ISTAT

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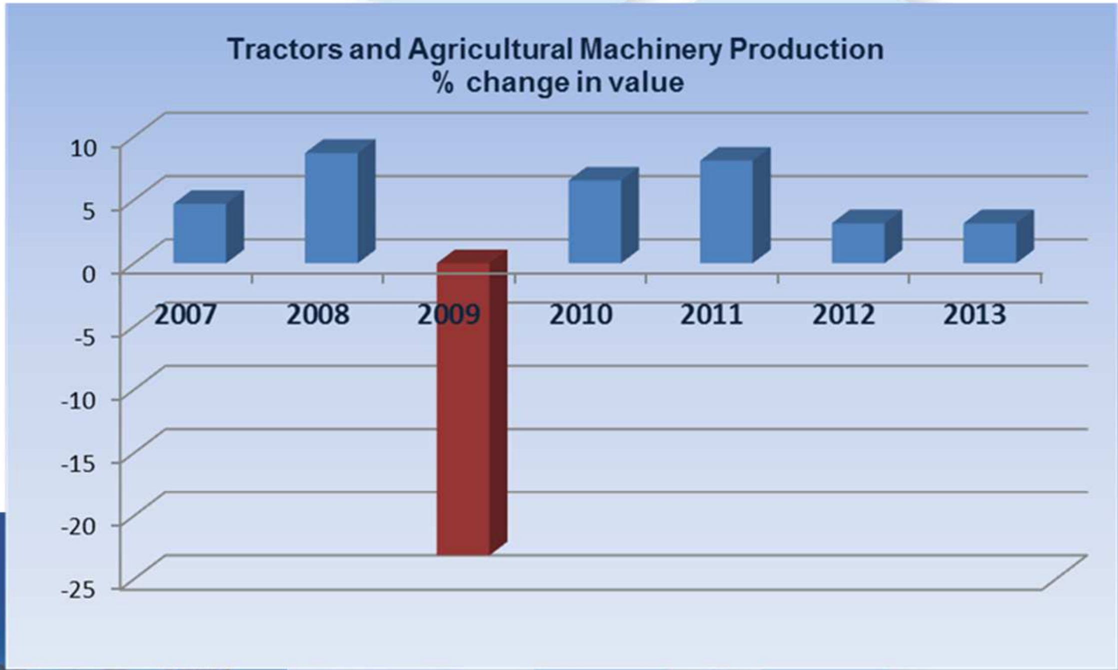
ITALIAN AGRICULTURE STRUCTURAL CHANGE

Source: ISTAT

FARM MACHINERY

TURNOVER



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FARM MACHINERY

TURNOVER

TURNOVER (€ Million)	2010	2011	2012	2013	% 12/11	% 13/12
TRACTORS	1,985	2,225	2,330	2,340	4.7%	0.4%
INCOMPLETE TRACTORS AND SPARE PARTS	743	710	730	740	2.8%	1.4%
AGRICULTURAL MACHINERY	4,005	4,344	4,449	4,580	2.4%	2.9%
TOTAL	6,733	7,279	7,509	7,660	4.7%	2.0%

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FARM MACHINERY

EXPORTS

EXPORTS (€ Million) CIF FOB Values	2010	2011	2012	2013	% 12/11	% 13/12
TRACTORS	1,220	1,393	1,491	1,545	7.0%	3.6%
INCOMPLETE TRACTORS AND SPARE PARTS	507	487	510	540	4.7%	5.9%
AGRICULTURAL MACHINERY	2,184	2,506	2,703	2,830	7.9%	4.7%
TOTAL	3,911	4,386	4,704	4,915	4.7%	4.5%

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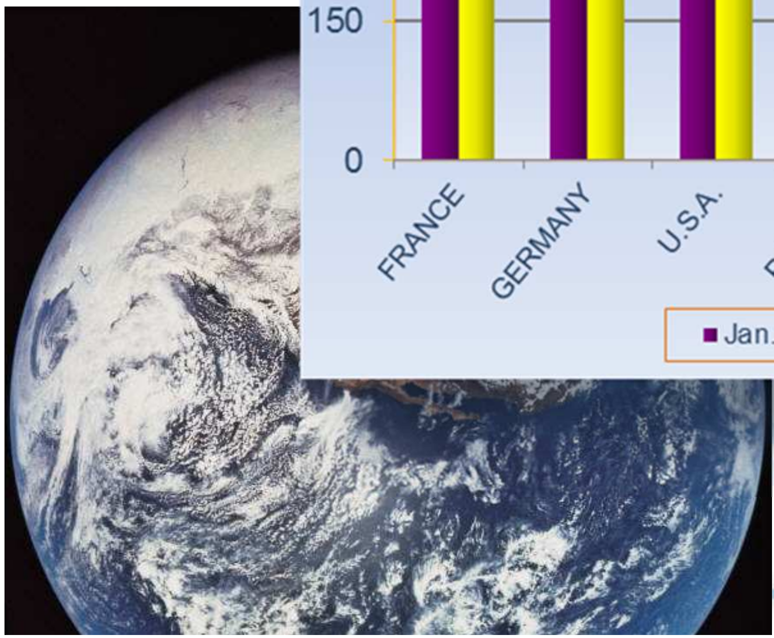
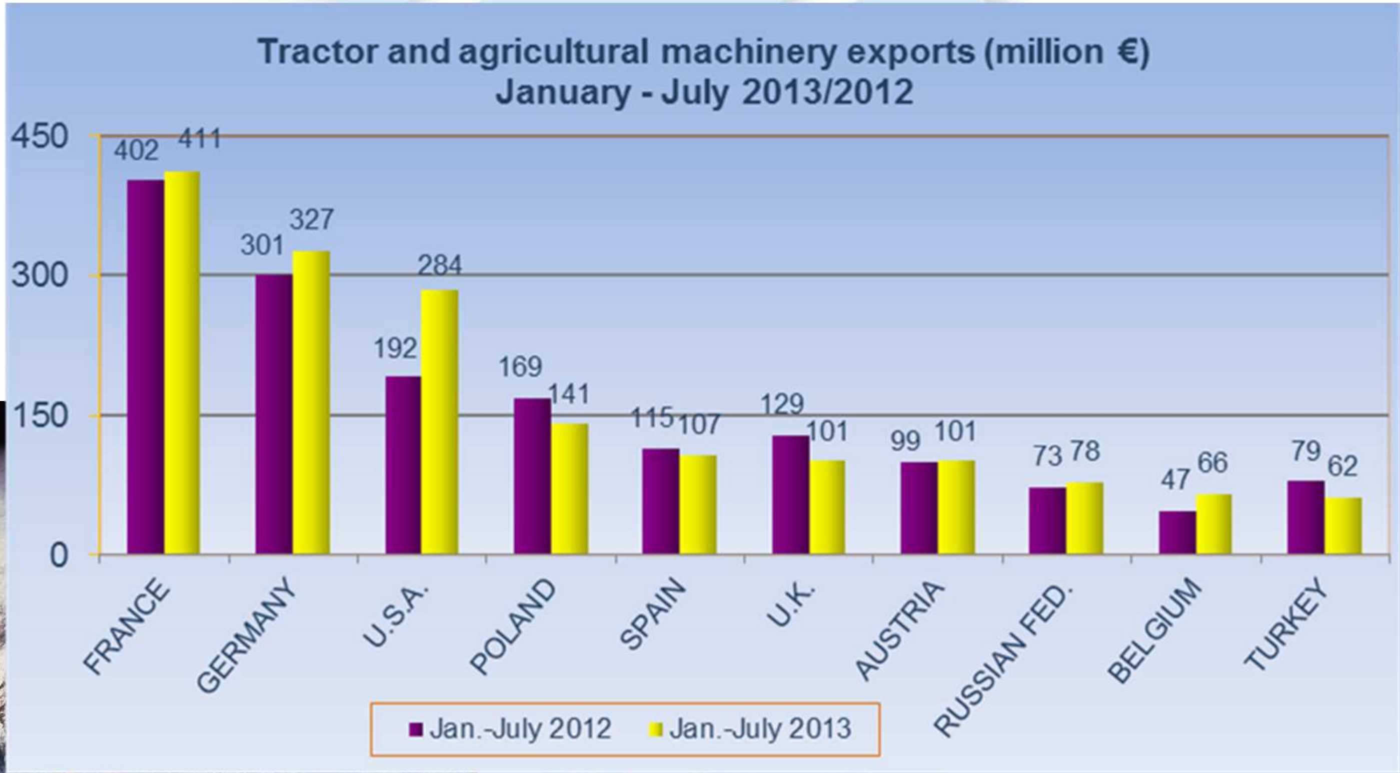
FARM MACHINERY

EXPORTS





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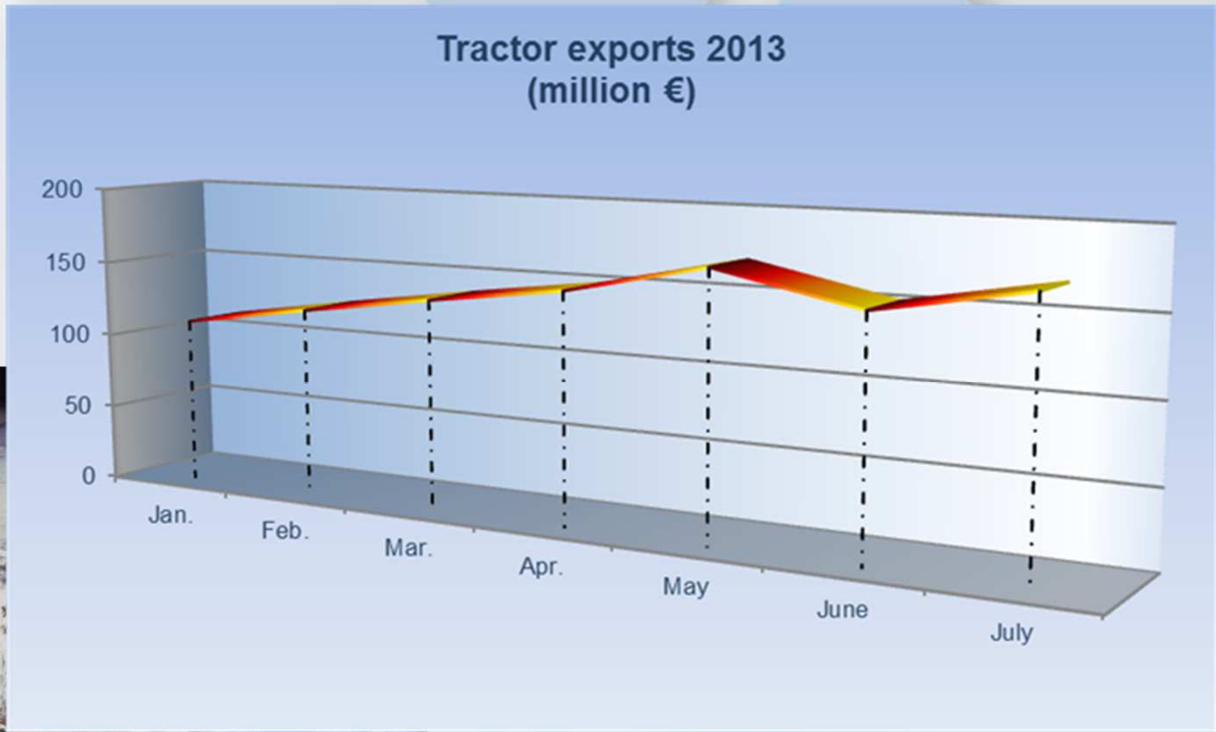
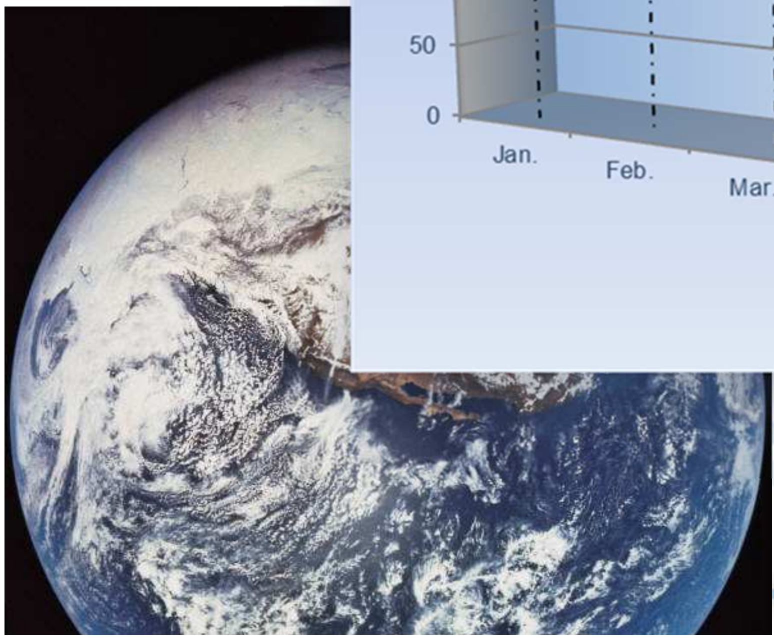
FARM MACHINERY

TRACTOR EXPORTS





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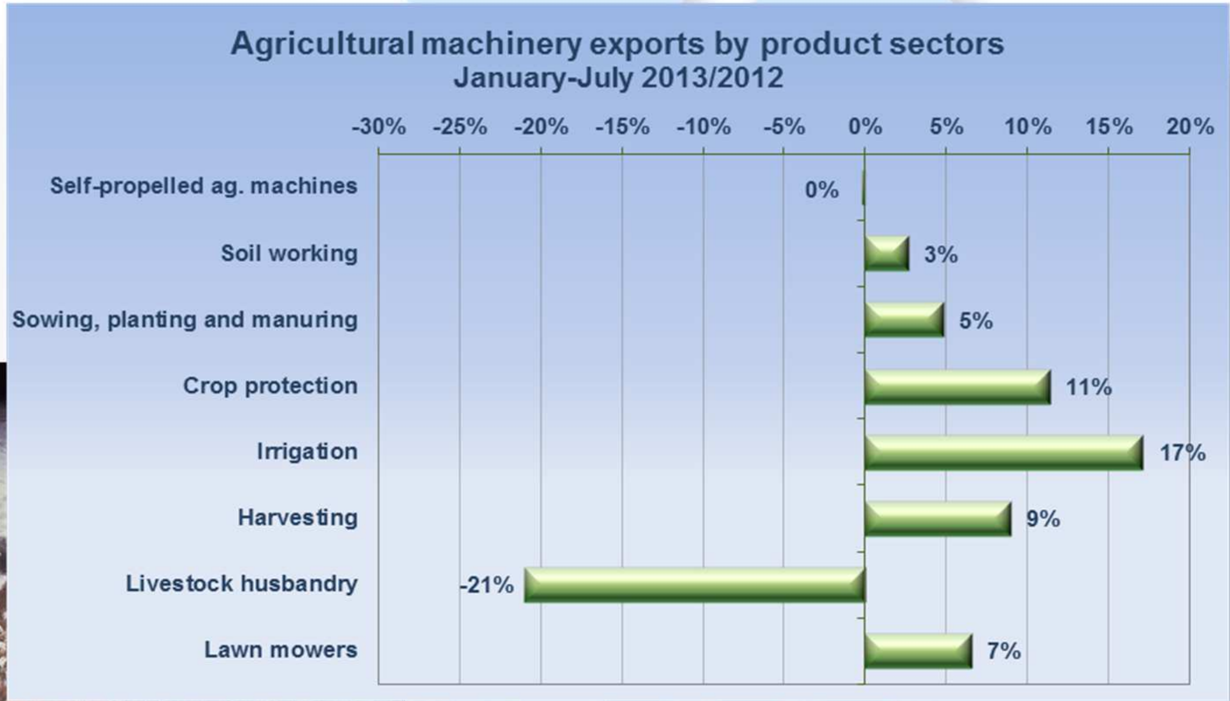
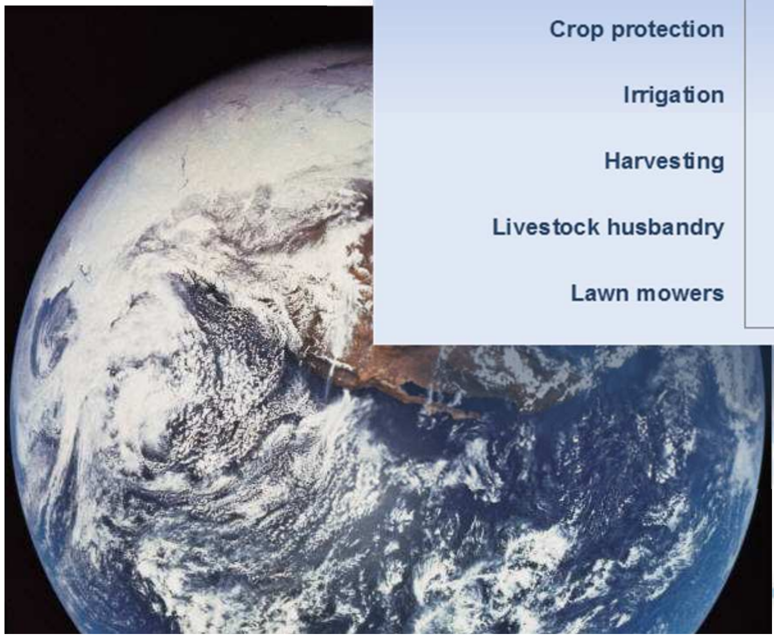
FARM MACHINERY

AGRICULTURAL MACHINERY EXPORTS





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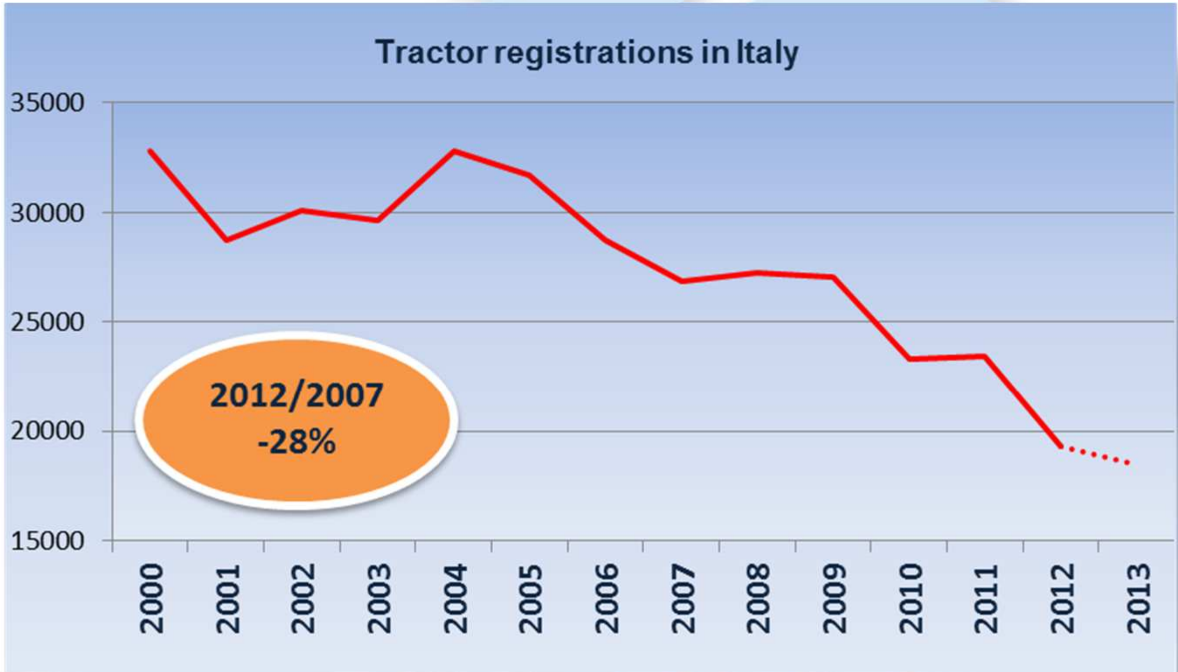
FARM MACHINERY

DOMESTIC MARKET



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FARM MACHINERY

DOMESTIC MARKET

Recourse to contractors

	2000	2010
Average working days per company	3.8	7.5

Source: FederUnacoma/Nomisma

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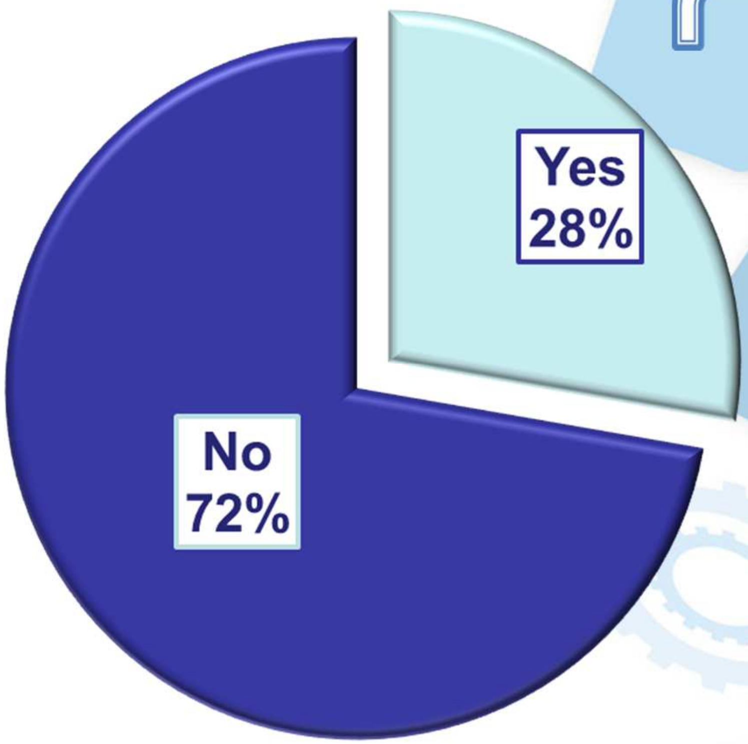
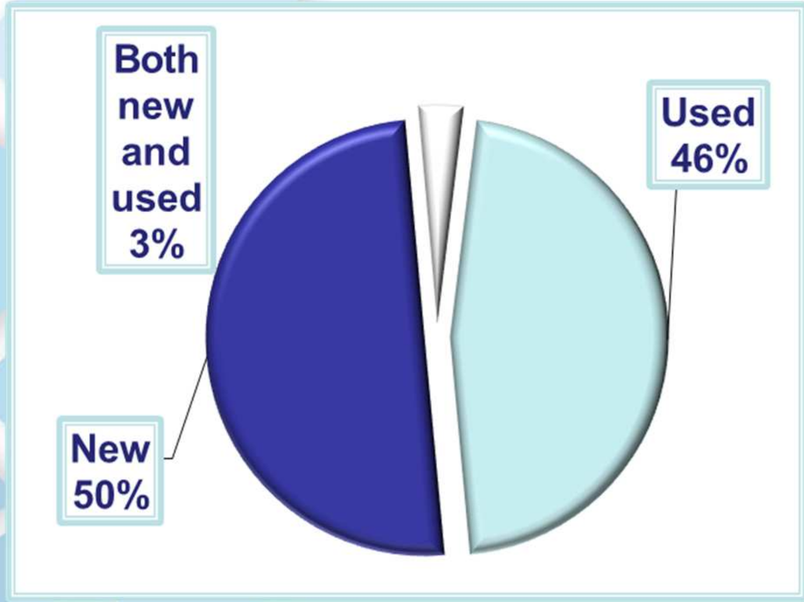
FARM MACHINERY

DOMESTIC MARKET

Purchases of agricultural machine over the past 5 years





Source: FederUnacoma/Nomisma

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FARM MACHINERY
DOMESTIC MARKET

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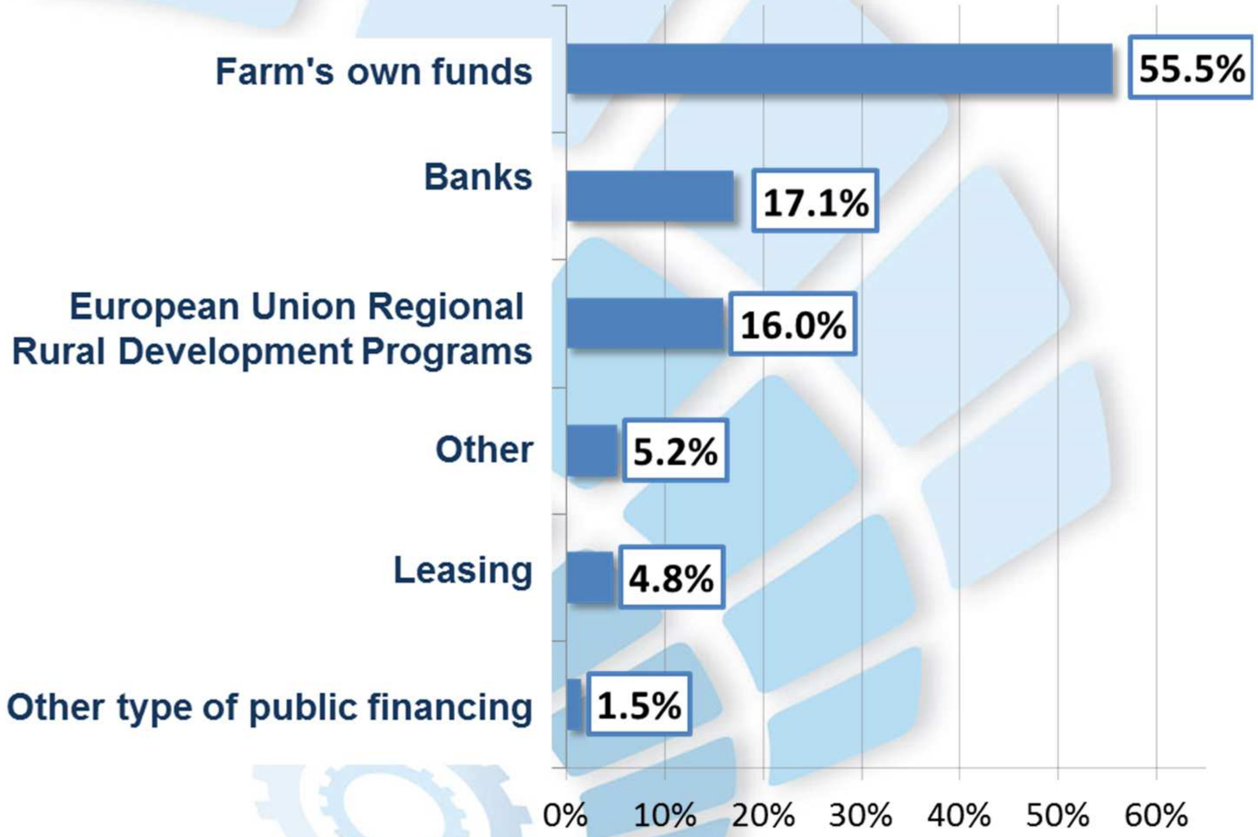

Source: FederUnacoma/Nomisma

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FARM MACHINERY

DOMESTIC MARKET

Intentions to purchase new agricultural machinery in the next 3 years

Source: FederUnacoma/Nomisma

Federazione Nazionale Costruttori Macchine per l'Agricoltura

FARM MACHINERY

DOMESTIC MARKET / REGISTRATIONS

	2012	Jan.-Sep. 2013
TRACTORS	-17,45%	-5.6%
COMBINES	-5,35%	+15.4%
TRANSPORTERS	-26,25%	-17.4%
TRAILERS	-11,96%	-8.1%

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TOPICS

- Recession affected domestic demand
- Difficulties in accessing the European funds
- Bureaucracy and taxes for both farmers and machinery manufacturers

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