

PRESS RELEASE

Positive Development for Arable Farming – Not All Segments Benefit *Stable Market expected in 2019*

Brussels/Frankfurt am Main, 27 March 2019 – The markets for agricultural equipment developed very differently in 2018. The market for soil tillage equipment in particular showed a clearly positive development. Sales of fertilizer spreaders and seed drills also increased compared with 2017. However, for crop protection equipment and precision drills, the European market was weaker than in the previous year.

According to preliminary information, the market volume for arable farming and crop protection equipment will amount to about 3.43 billion euros in 2018. This shows an increase of about 5 % compared with the previous year. Based on a forecast survey among CEMA participants, no significant market change is expected in the current year (+1%).

Three CEMA Product Groups met for their annual meeting in March at the headquarters of Lemken (Alpen, Germany), where company delegates enjoyed great hospitality, including a factory tour. The chairmen of the three committees, **Elke Pankow** (Rauch Landmaschinenfabrik GmbH, Germany) for sowing and fertilising technology, **Peter Henrik Dahl** (Hardi International A/S, Denmark) for crop protection equipment and **Mattias Hovnert** (Väderstad AB, Sweden) for soil tillage equipment, together with the Secretary General of CEMA **Jérôme Bandry**, welcomed new participants to the group: **Bednar** from the Czech Republic and two Spanish companies **Ovlac** and **Sembradoras Gil** were represented for the first time. CEMA Product Groups are managed within a strict compliance framework on the basis of dedicated statistics.

Intelligent solutions, user-friendly and digitally connected machines

Based on market-specific trends, participants agreed that the focus is less on the number of machines or the size, but rather on flexible and intelligent solutions for multifunctional machines. Aspects such as organic farming, climate change, road safety or EU type approvals are also relevant to manufacturers of modern equipment. According to the unanimous opinion of the group, the customer wants above all user-friendly and digitally connected machines.

Once again significant differences between the European countries became clear. "In 2018, the French market showed compensatory growth in all equipment areas for soil tillage and plant care following very significant market declines until 2017," says **Nina Janßen**, coordinator of these three CEMA product groups for soil tillage and crop protection.

The CEMA product groups are composed of leading European manufacturers of equipment for arable farming, for harvesting forage and hay, as well as tractors and combine harvesters. The main focus is on the joint evaluation of the market based on dedicated statistics. Currently, 29 companies from 11 European countries are members of the CEMA product groups in the field of arable farming. The prerequisite for participation is membership in a national industry association belonging to the umbrella organisation CEMA.

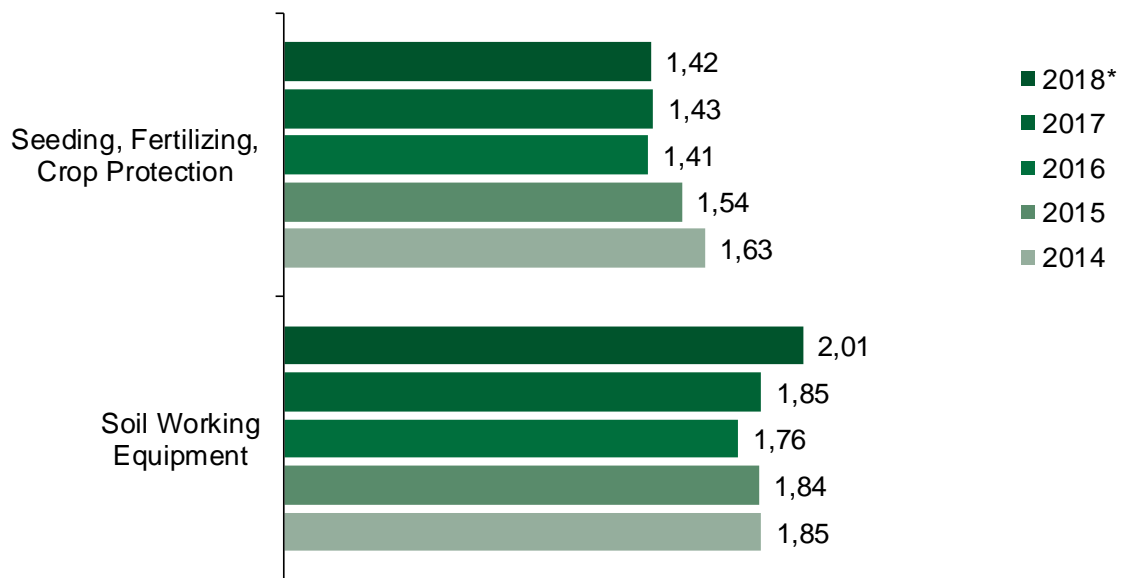
Further information can be found at <https://www.cema-agri.org/market-trends>

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Members of the CEMA Product Groups "Arable Farming" at Lemken company headquarters

Market Volume for Arable Equipment in the European Union
in billion Euro

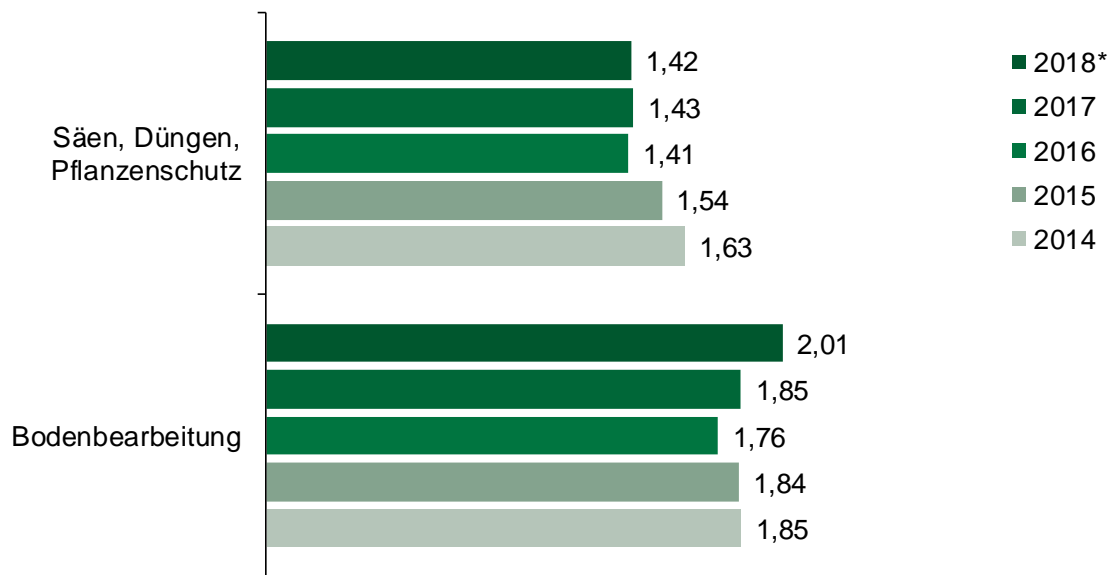


* preliminary

Source: CEMA, VDMA

Marktvolumen für Ackerbaugeräte in der Europäischen Union

in Mrd. Euro



* vorläufig
 Quelle: CEMA, VDMA

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CEMA (www.cema-agri.org) is the European association for the agricultural machinery industry. The sector represented by CEMA comprises 4,500 manufacturers of agricultural machinery. There are 135,000 people directly employed in the sector, with a further 125,000 working in the related distribution and service areas. The companies represented, which are primarily small and medium-sized manufacturers, as defined by the EU, generated a total turnover €27 billion in the year 2014.