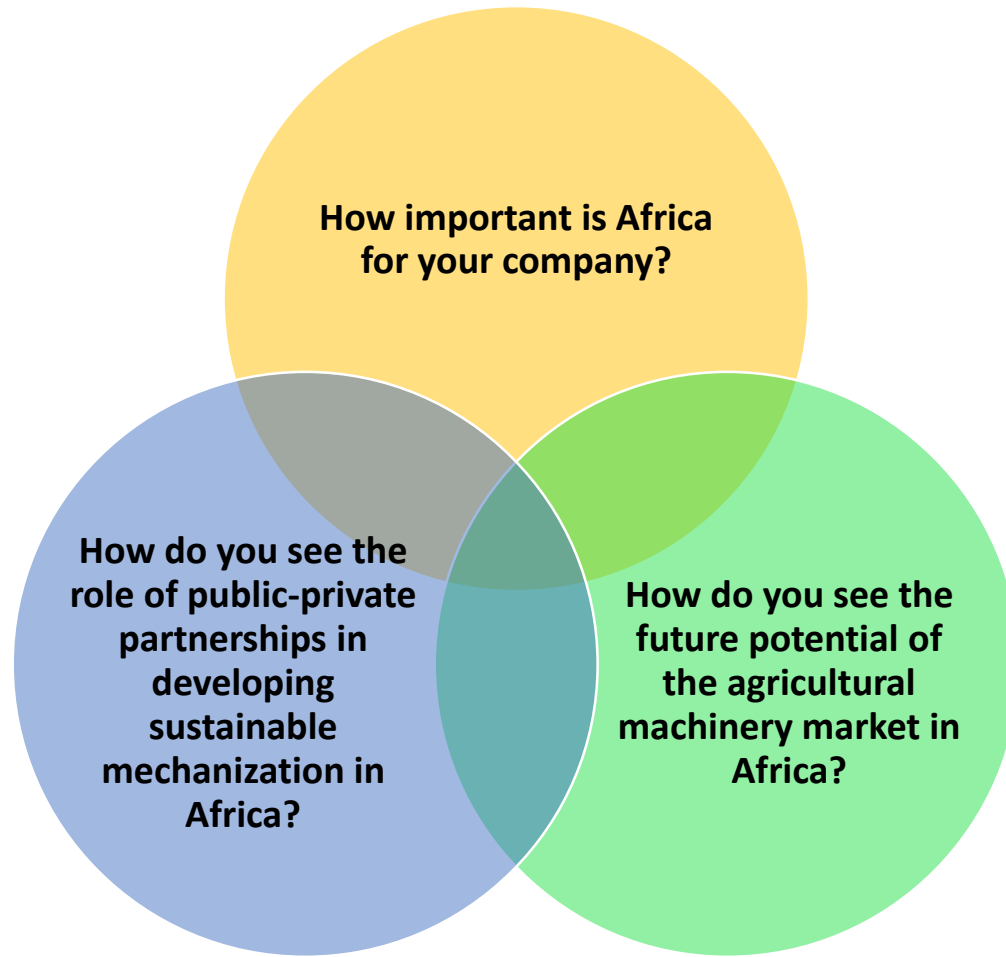




Survey on the importance and future potential of the agricultural machinery market in Africa (lead by CEMA)





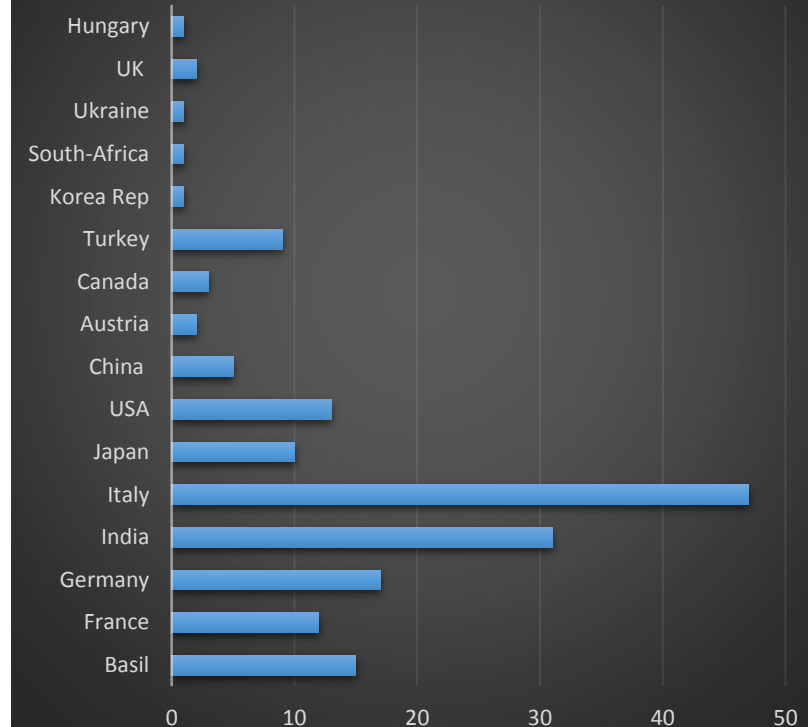
Data sources

171 companies responded

16 countries representing the main suppliers of tractors and other agricultural machinery

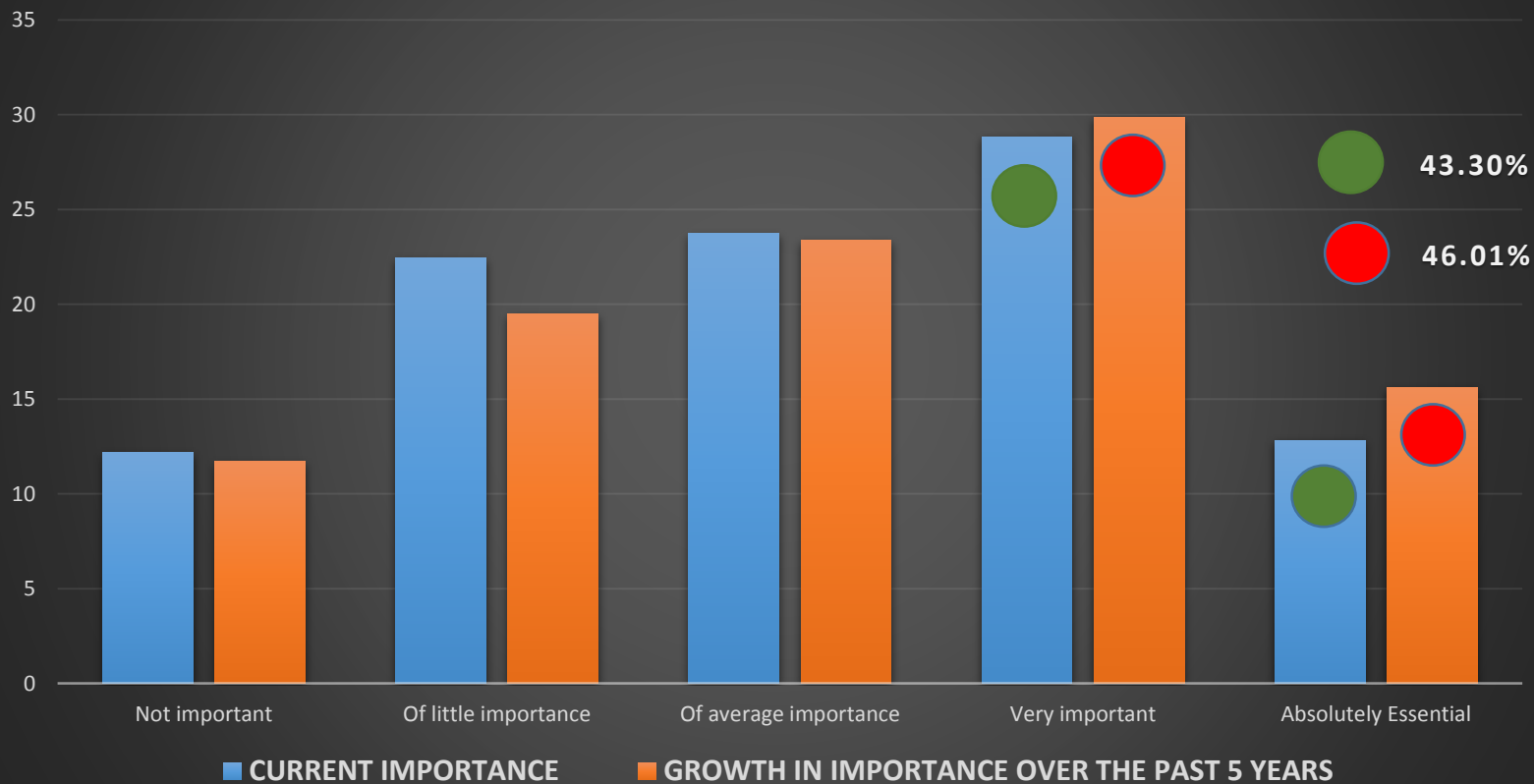
- Austria
- Brazil
- Canada
- China
- France
- Germany
- Hungary
- India
- Italy
- Japan
- Korea
- Turkey
- South-Africa
- Ukraine
- United Kingdom
- USA

Number of responses per country





How important is Africa for your company, % ?





What has improved/worsened in your business dealings with Africa in the past 5 years?

Worsened

- Political stability
- Currency exchange
- Import regulations
- Financing potential
- Growing competition locally and from China and India
- Subsidies
- High volatility of commodity prices
- Difficulties to find a strong partner

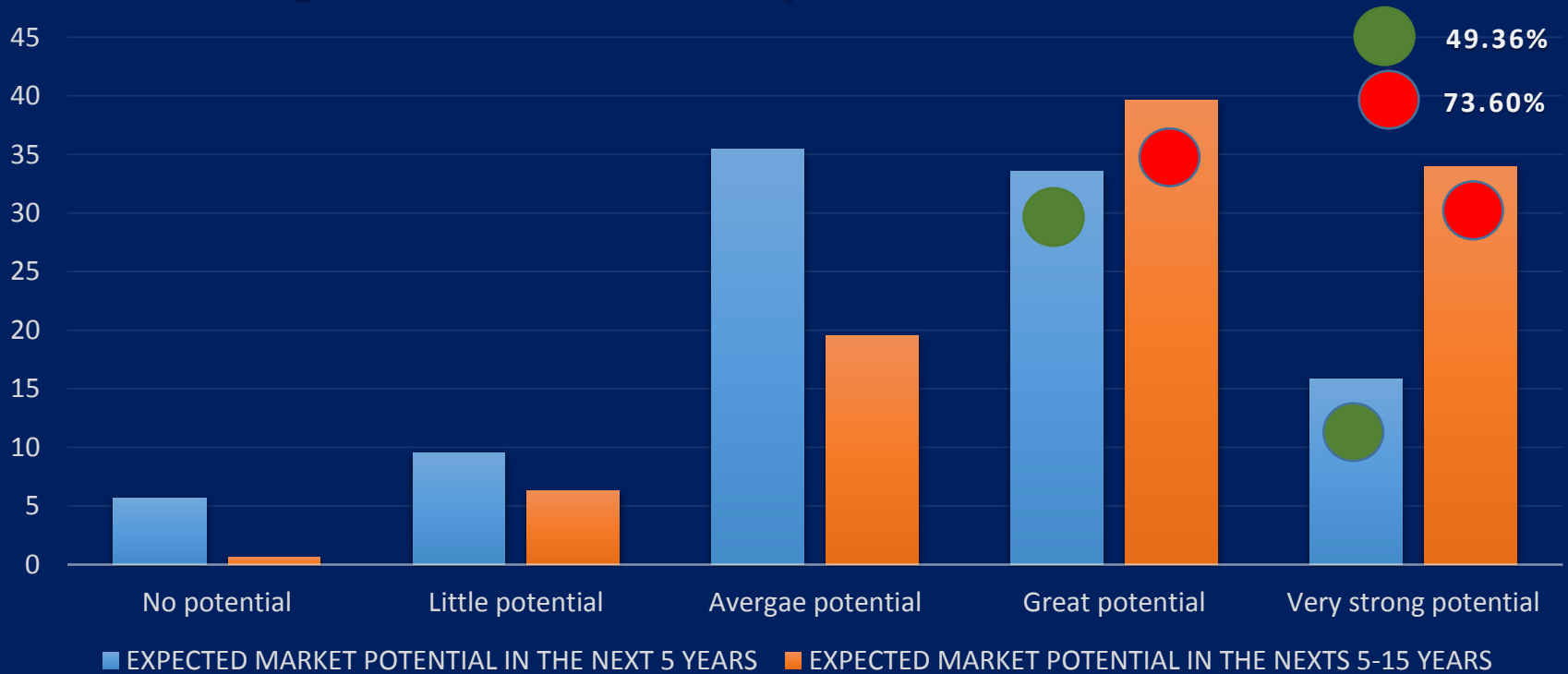
Improved

- Demand for farm mechanization
- Technical knowledge
- Better understanding of the farmers for quality products
- Understanding of the markets
- Communication and response
- Less corruption
- Distribution network
- More knowledge of how to trade in Africa (north and south)
- Commercial farms





How do you see the future potential of the agricultural machinery market in Africa, % ?





What needs to improve in Africa for your company to get more involved/invest more?

Government

- Policies and regulations
- Business environment
- Political and economical stability
- Development mechanization strategy
- Reduced custom tariffs
- Less corruption
- Develop basic infrastructure

Finance and Market

- Credit availability
- Reliable banking system
- More stable currencies
- Payment issues and line of credits
- Market dynamics knowledge

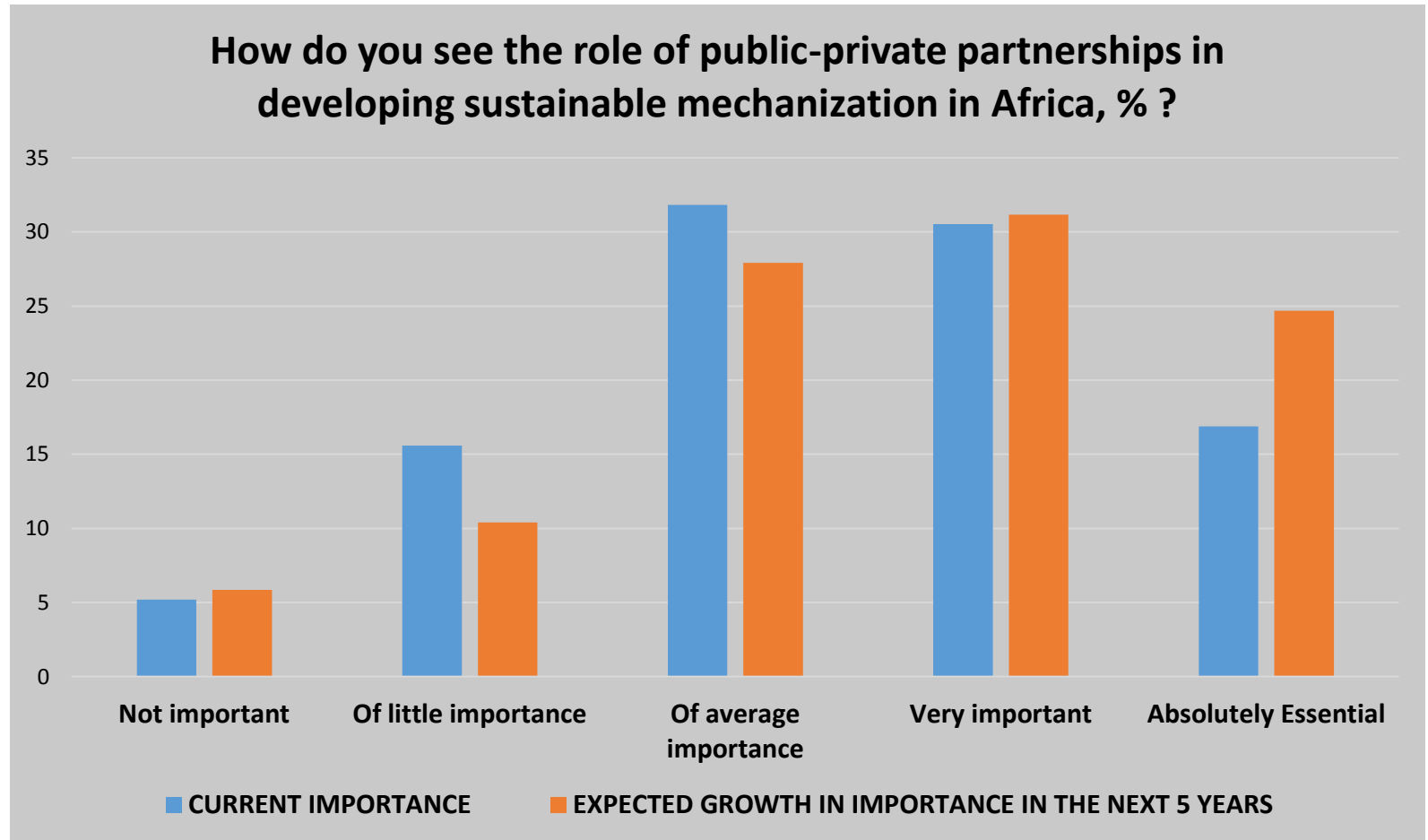
Industry

- Develop dealership network
- Companies needs to know better each other
- Exhibitions, trade fairs and B2B meetings
- Local production
- Field testing of equipment

Farmers and skills

- Technical know-how – education
- Change in the Agricultural methods
- Focus on quality rather than price
- More commercial farmers
- Awareness on technology







Which best practice features come to mind when thinking about successful PPPs on ag mechanization in Africa?

