



ARGENTINIAN CHAMBER OF AGRIMACHINERY MANUFACTURERS

AGRIEVOLUTION REPORT – APRIL 2025

ARGENTINIAN AGRIMACHINERY INDUSTRY

FIRST APPROACHES



- **1260 companies**
- **40,000 direct employments**
- **97% local companies**
- **86% family-owned companies**
- **23% regularly export**
- **+60 export destinations**

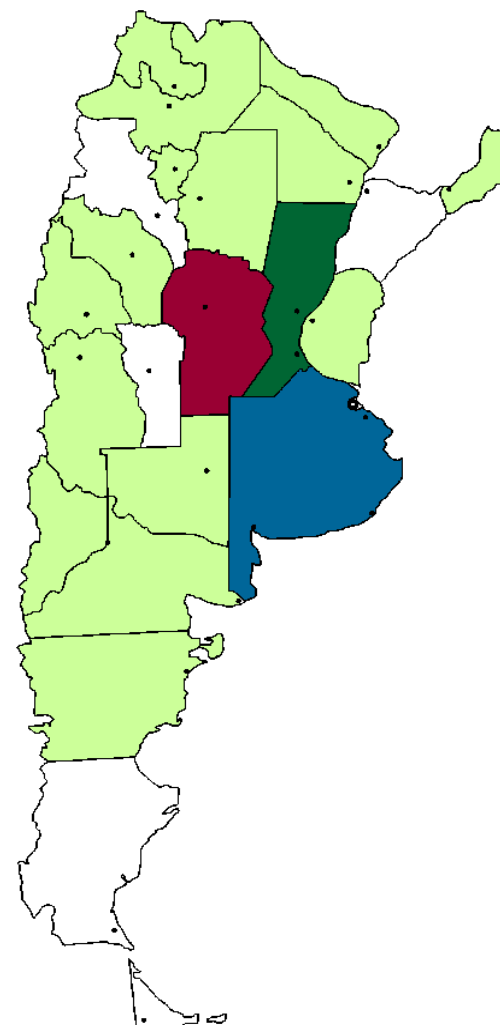
ARGENTINIAN AGRIMACHINERY INDUSTRY





GEOGRAPHICAL DISTRIBUTION



CAFMA

CAMARA ARGENTINA FABRICANTES
DE MAQUINARIA AGRICOLA



-  Buenos Aires - 15%
-  Santa Fe - 45%
-  Córdoba - 35%
-  Other Provinces - 5%

Source: CAFMA



ARGENTINIAN AGRICULTURE

MAIN CROPS – 2024

EXPORTS

MAIN CROPS - Percentage of participation in total exports – 2024



**SOY
BEAN**
24,6%



WHEAT
3,5%



CORN
9,1%



**SUN
FLOWER**
1,8%

EXPORTS

MAIN CROPS – Exports variation – 2023 comparison



**SOY
BEAN** ↑
40.7%



WHEAT ↑
91.3%



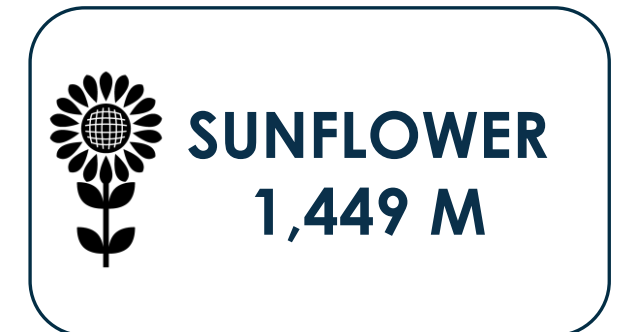
CORN ↑
13.1%



**SUN
FLOWER** ↑
2.4%

EXPORTS








MAIN CROPS – Total exports in million dollars –2024



CROP PRODUCTION

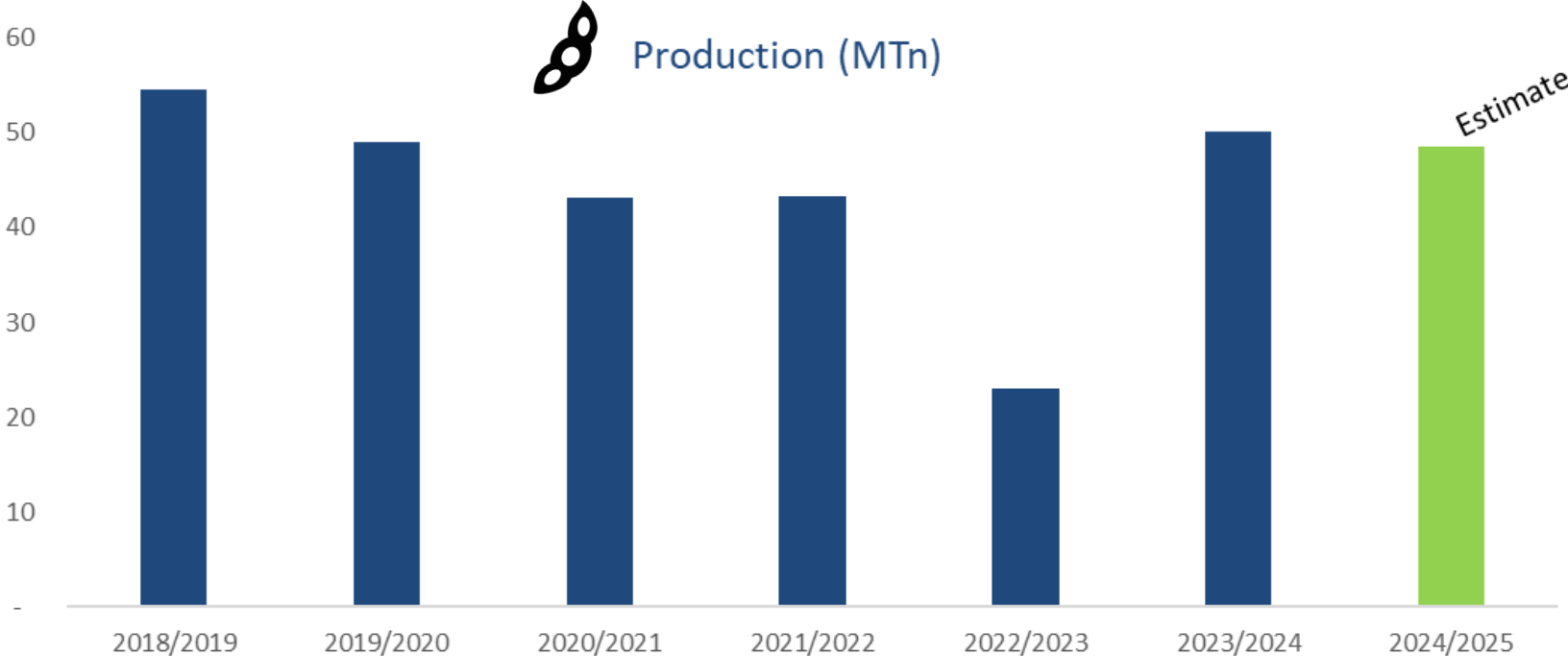
22/23 and 23/24 Campaign results - 2025 FORECAST



SOY BEAN			
	2022/23 Campaign	2023/24 Campaign	2024/25 Forecast
Sown	16,2 Mha	16,4 Mha 	17,6 Mha 
Yield	15,4 qq/ha	31,2 qq/ha 	27,8 qq/ha 
Total Production	21,0 Mt	50,0 Mt 	45,5 Mt 

PRODUCTION EVOLUTION

SOY BEAN










Source: Bolsa de Cereales / Bolsa de Comercio de Rosario

CROP PRODUCTION

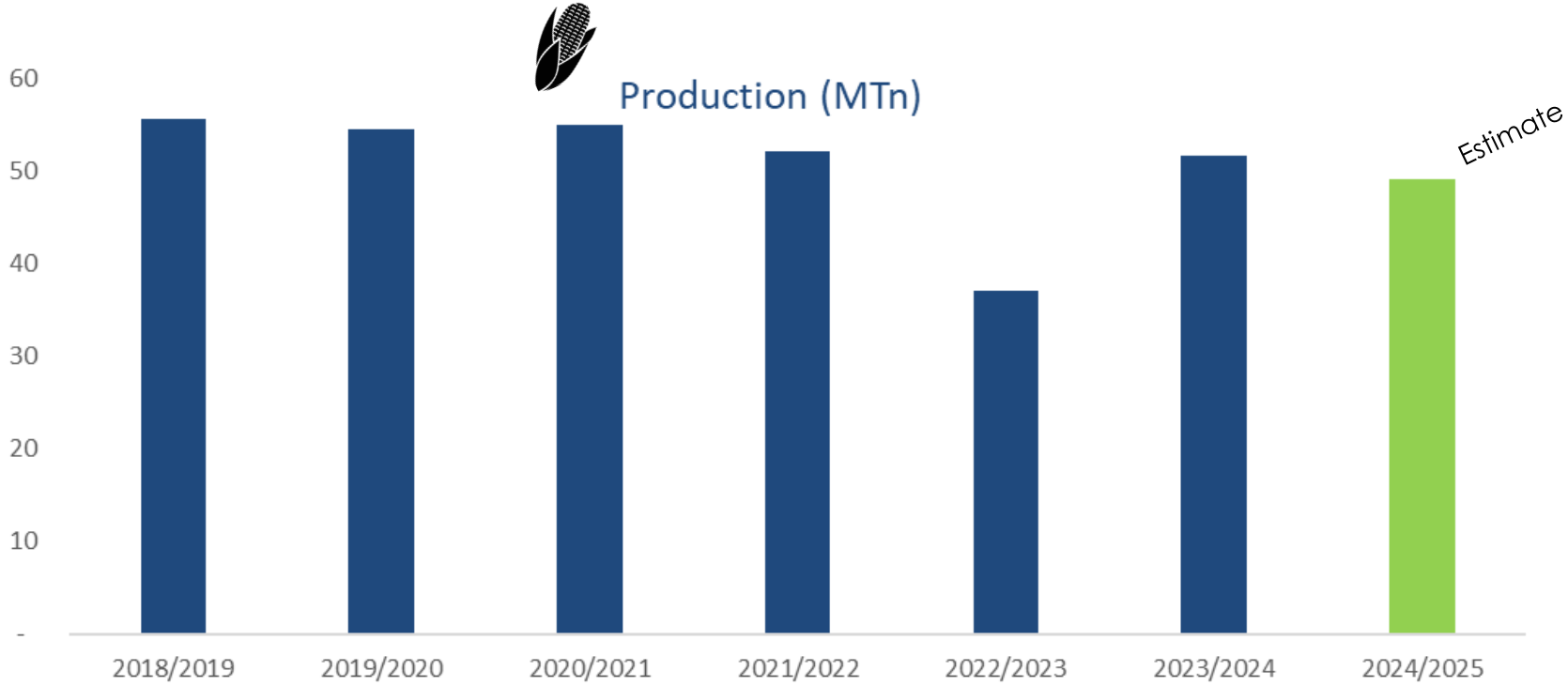
22/23 and 23/24 Campaign results - 2025 FORECAST



CORN			
	2022/23 Campaign	2023/24 Campaign	2024/25 Forecast
Sown	7,1 Mha	10,3 Mha 	8,3 Mha 
Yield	50,6 qq/ha	65,6 qq/ha 	69,2 qq/ha 
Total Prod	34,0 Mt	52,5 Mt 	48,5 Mt 

PRODUCTION EVOLUTION

CORN










Source: Bolsa de Cereales / Bolsa de Comercio de Rosario

CROP PRODUCTION

21/22 and 22/23 Campaign results - 2024 FORECAST



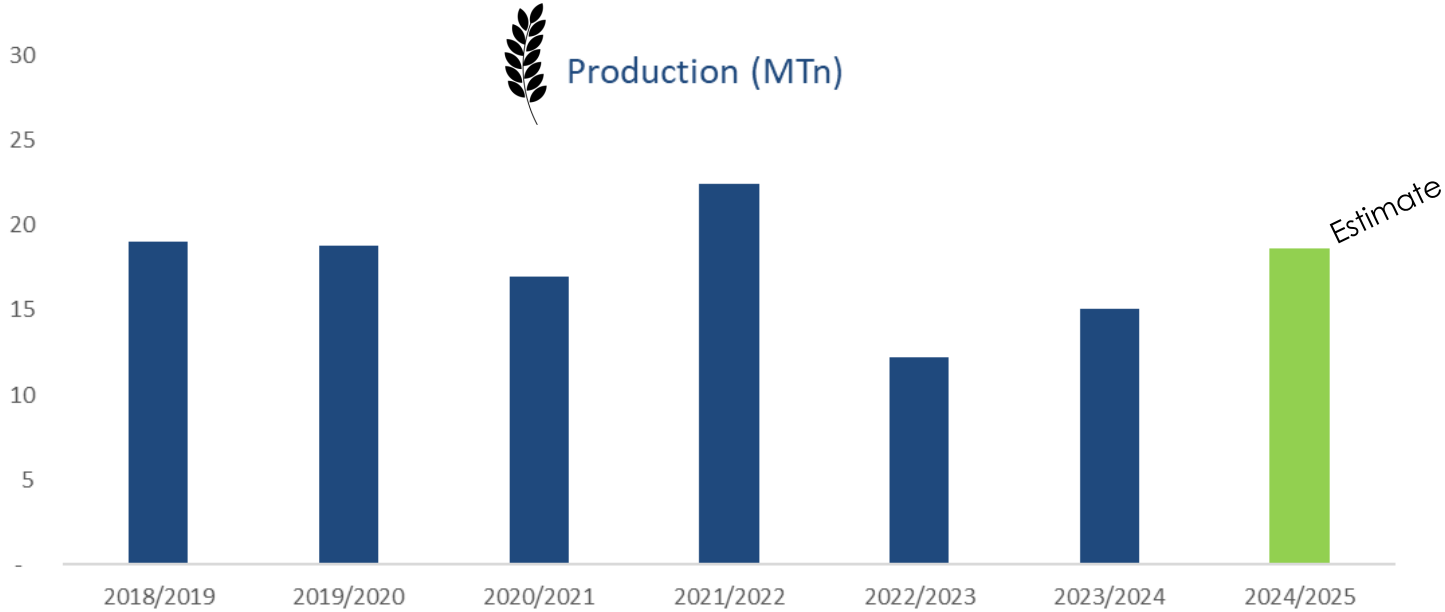
WHEAT			
	2022/23 Campaign	2023/24 Campaign	2024/25 Forecast
Sown	6,1 Mha	5,5 Mha 	6,7 Mha 
Yield	22,8 qq/ha	28,3 qq/ha 	30,2 qq/ha 
Total Prod	12,4 Mt	14,5 Mt 	19,3 Mt 

PRODUCTION EVOLUTION

WHEAT



Source: Bolsa de Cereales / INTA




Source: Bolsa de Cereales / Bolsa de Comercio de Rosario

CROP PRODUCTION

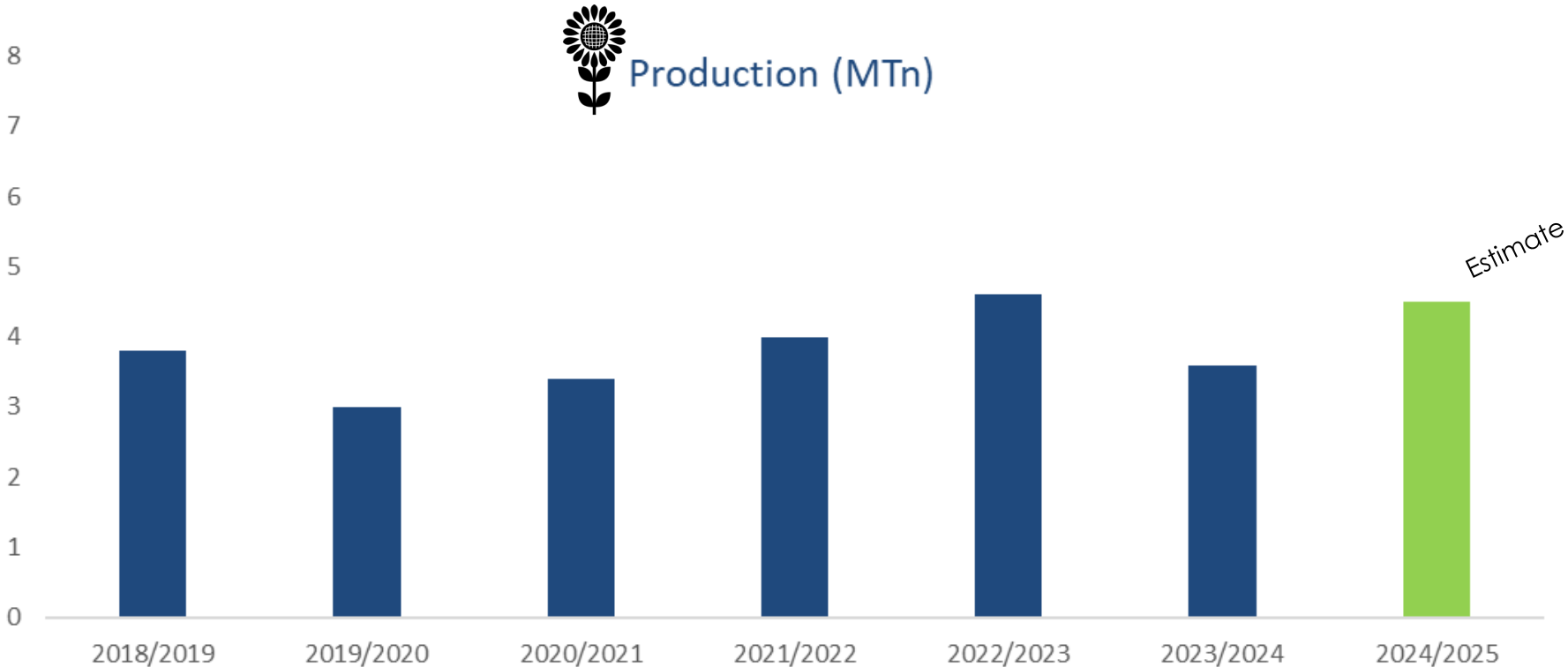
21/22 and 22/23 Campaign results - 2024 FORECAST



SUNFLOWER			
	2022/23 Campaign	2023/24 Campaign	2024/25 Forecast
Sown	2,4 Mha	1,9 Mha ↓	2 Mha ↑
Yield	20 qq/ha	20,2 qq/ha ↑	
Total Prod	4,6 Mt	3,6 Mt ↓	4,5 Mt ↑

PRODUCTION EVOLUTION

SUNFLOWER



Source: Bolsa de Cereales



ARGENTINIAN AGRIMACHINERY MARKET

ARGENTINIAN AGRIMACHINERY NATIONAL MARKET



2023 – 2024 COMPARISON

**COMBINE
HARVESTERS**
↑ 9,2 %

SEEDERS
↑ 24,8%

TRACTORS
↓ 13,9%

**Grain storage and
transport machinery**
↓ 1,9%

SPRAYERS
↓ 3,1%

ARGENTINIAN AGRIMACHINERY NATIONAL MARKET



TOTAL SALES – 2023/24 – In units

TOTAL SALES			
PRODUCT	2023	2024	VARIATION
Harvesters	653	713	9,2% ↑
Tractors	8013	6896	-13,9% ↓
Seeders	1547	1931	24,8% ↑
Sprayers	921	892	-3,1% ↓
Grain storage and transport machinery	2179	2137	-1,9% ↓

Source: INDEC

AGRIMACHINERY FOREIGN MARKET



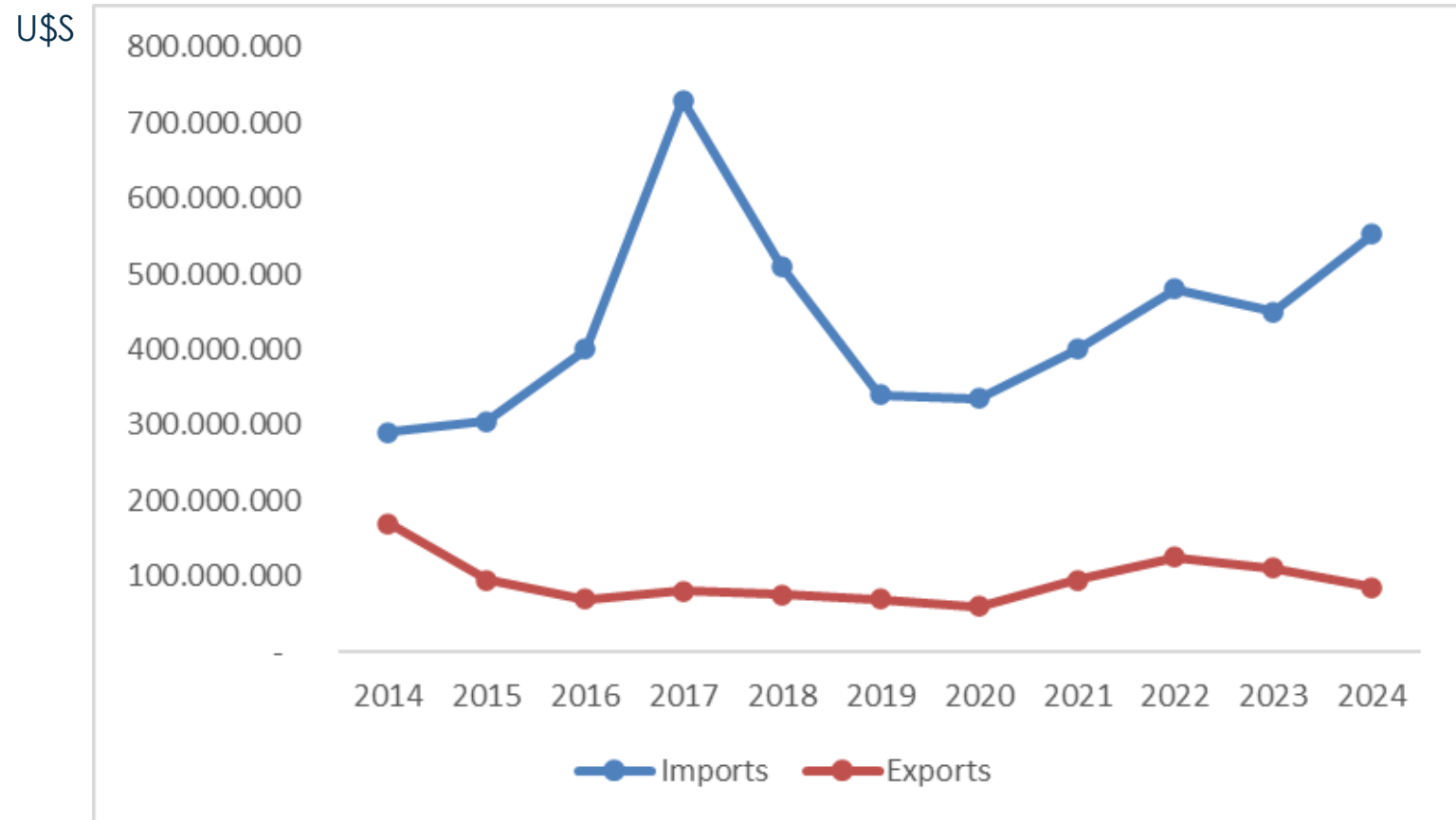
IMPORTS
U\$S 552 MILLON

EXPORTS
U\$S 84 MILLION

AGRIMACHINERY FOREIGN MARKET



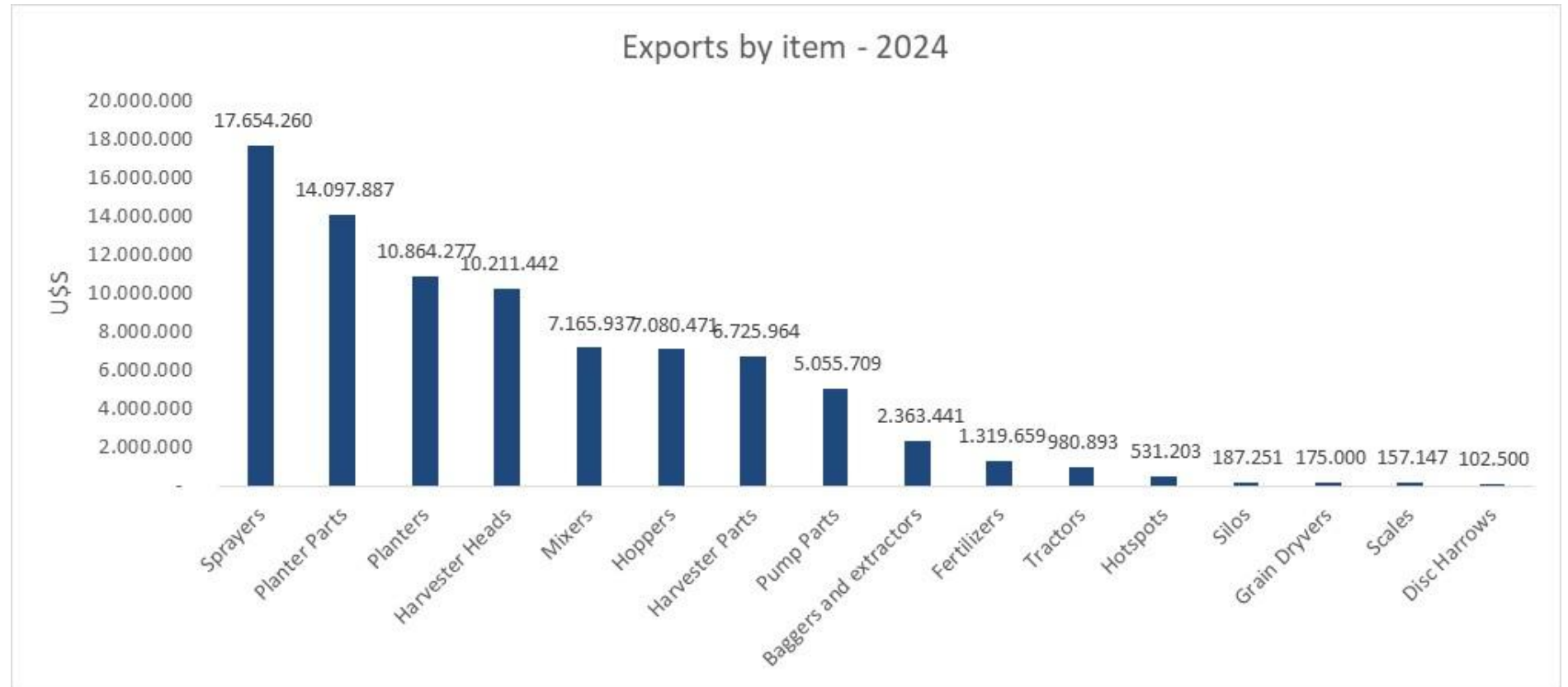
2014 – 2024 EVOLUTION



Source: INDEC / CAFMA

EXPORTS

MAIN ITEMS, 2024



Source: INDEC / CAFMA

CONCLUSIONS



- **Continued recovery** of agricultural production level after the 2022/23 drought.
- **Low farmers' profitability** due to input inflation and exchange rate.
- **Strong falls** in domestic agrimachinery market during first semester, mainly in self-propelled machines.
- Trend change during the second semester but **not enough** to reach positive annual variations, except in harvesters.
- **2025 to be better** than last year for agrimachinery market, mainly explained by the agricultural production environment and the central role of banks with **financing at trade fairs**



Agrievolution
SUMMIT



SAVE THE DATE

**ACHIEVING FOOD SECURITY AND SUSTAINABLE AGRICULTURE
THROUGH MECHANIZATION AND PRECISION TECHNOLOGIES**

 **SEPTEMBER
1 TO 3 2025** 
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