



Agricultural engineering and technologies:
A dynamic and innovative sector for a performing and sustainable agriculture

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AXEMA: a driving force in Agricultural Equipment

- To support high performance and the changes occurring in the sector, the associations representing Agricultural Equipment Manufacturers in France have decided to join together to form a unique, useful and united group, in order to be more representative, efficient and reactive.
- AXEMA represents 90% of the French Agricultural Equipment market. It brings together 230 companies who are manufacturers of machinery for agriculture, landscaping and gardening from all over the world, often world or European leaders in their domain.
- The French market which is about 4 billions euros is characterised by very dynamic international exchanges. Exports of French products make up more than 70% of its production, while the market has 75% imports.

AXEMA is active on a European scale

To support its political actions, AXEMA also provides representation and defence of common interests of the profession towards European Union.

In this respect AXEMA has developed an organised system of lobbying on both national and European levels, in coordination with other major national manufacturers' associations in Europe, through CEMA (*European Committee of Associations of Manufacturers of Agricultural Machinery*)

Axema is also member of EGMF (*European Garden Machinery Federation*)

Agricultural Equipment: a very diverse sector

- Tractors
- Soil preparation and seeding
- Harvesting of grains, forage, root crops (e.g. potatoes, sugar beets)
- Organic and mineral fertilisation
- Crop protection
- Orchards and vineyards equipments
- Transport
- Handling
- Livestock equipment
- Milking and dairy industry
- Wine making
- Landscaping and gardening
- Buildings and greenhouses
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Agricultural Equipment : from small companies to multinational companies

- Half of the world market is shared between four major players, (logically mainly with tractors, and grain and forage harvesters)
- A trend towards high-medium size groups intending to provide a comprehensive range of widely used machinery
- SMEs
 - to hold on for specialised sectors like livestock, root crops, fruit and vegetables, vineyards..
 - or to try to grow up and join above mentioned trend

Markets and trade

- World wide production value was 57 Billions euros in year 2009
- Main « regional » markets are EU (22), North America (16,1), China (5,8) and India (4)
- Trade within EU is very dynamic since 2 machine/tractor out of 3 are exported from one member state to another.
- Meanwhile, 30% of EU production is sent to a non EU country.
- Even small companies are part of this international trade, as a means to regulate possible local abrupt variations for instance.

An innovative industry since its origins

- By the end of 19th century, prospect of powered mechanisation opened a huge « blank page » for inventors. Many of the processes we still use were then known or even implemented in early 20th. This was made possible also through close relations between manufacturers and (demanding) farmers. Here was printed the sustainable innovative and customer oriented spirit of our industry.
- Then came the intensive agriculture implementation in Europe, where ag. machinery industry improved output performances by early use of new technologies, before other mobile machinery sectors did, namely:
 - Hydraulics and Hydrostatics which improved flexibility, reliability and capabilities
 - Electronics which initiated implementation of efficient regulation and control systems

In parallel continuous progress was made in mechanics. Let us mention development of various types of specific tractor transmissions, and reduction of noise and vibrations.

This phase was oriented by comprehensive agronomical developments

Where are we now in Europe?

- ↓ Energy is a concern because of cost (stability, level), CO2 emissions, long term shortage
- ↓ Crop protection is a concern because of products cost (energy content), effect on environment, effect on health.
- ↓ Fertilisation is a concern, for similar reasons

- ↑ Information technologies and positioning systems:
 - Make possible an integrated farming system where machinery is in
 - Reduce work load and reduce production costs through increased precision.
 - Extend scope of robot solutions to open field ones.

Industry has answers to each technical problem (!) but

- It is expected that cultivation practices shall be reviewed, new ones shall be implemented, that will strongly influence our industry sector. In this respect Industry seeks for early visibility on what farming systems will be.
- Efforts shall be made to optimise not isolated machines but machinery in farming systems which face growing number of constraints
- We understand and welcome that this approach is shared within this AgEng2010 International Conference

To further analyse world wide trends AXEMA will be hosting

AGRIEVOLUTION PARIS 2011

3rd World Summit on Agricultural Machinery
supported by **CEMA**

20/21 February 2011 at **SIMA**

- After Rome in May 2008 and Orlando in Jan 2010, AgriEvolution is going to be held for a third time in Paris, in parallel to the SIMA exhibition (20-24 Feb 2011)
- The event is designed to provide an informative insight into the influence of Agricultural Equipment on the changes and challenges in world agriculture.



An event directed to decision makers

Agrievolution is a highly targeted event. It is directed at 250 decision makers and professionals from all over the globe from:

- the political arena,
- agricultural organisations,
- management of major world scale manufacturers,
- professional agricultural equipment organisations,
- the international press.

Main issues at the heart of today's concerns draft round tables programme:

- ❑ **Theme 1: Agriculture around the world**
 - The main stakes at play in agriculture today and tomorrow,
 - Case scenarios for world agricultural development,
 - Major agricultural trends (globalisation / cross border investment / impact on civil society).

- ❑ **Theme 2: The agricultural equipment industry in the world today**
 - Close-up on key markets of today and tomorrow
 - What changes are needed in agricultural equipment to address the major issues of tomorrow's world?
 - How equipment contributes to agriculture, and how it plays a vital role in society and the economy.



We look forward to seeing you in

Paris « agricultural capital of the world”
in February 2011



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SECIMA / SNCVA / SYGMA