RUSSIAN AGRICULTURAL MACHINERY: CURRENT SITUATION AND PROSPECTS

Moscow
2019
### Development of Agricultural Machinery

#### Production and Economic Indicators of Enterprises in 2013-2018 yy.

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic Shipments, Billion Rubles</th>
<th>Domestic Market Share, %</th>
<th>Export, Billion Rubles</th>
<th>New Models, Units</th>
<th>Manpower, Th People</th>
<th>Average Monthly Salary, Th Rubles</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>30,5</td>
<td>24</td>
<td>4,2</td>
<td>25</td>
<td>21,9</td>
<td>25,0</td>
</tr>
<tr>
<td>2014</td>
<td>35,8</td>
<td>28</td>
<td>4,0</td>
<td>38</td>
<td>22,1</td>
<td>26,8</td>
</tr>
<tr>
<td>2015</td>
<td>48,9</td>
<td>40</td>
<td>5,8</td>
<td>51</td>
<td>30,8</td>
<td>27,7</td>
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<tr>
<td>2016</td>
<td>80,6</td>
<td>54</td>
<td>6,8</td>
<td>75</td>
<td>33,8</td>
<td>31,8</td>
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<tr>
<td>2017</td>
<td>97,9</td>
<td>56</td>
<td>7,9</td>
<td>150</td>
<td>38,5</td>
<td>32,9</td>
</tr>
<tr>
<td>2018</td>
<td>100,6</td>
<td>60</td>
<td>11,1</td>
<td>161</td>
<td></td>
<td>33,6</td>
</tr>
</tbody>
</table>

- Domestic shipments increased by 3.3 p. from 2013 to 2018.
- Domestic market share increased by 2.5 p. from 2013 to 2018.
- Export increased by 2.6 p. from 2013 to 2018.
- New models increased by 7% from 2013 to 2018.
- Manpower increased by 3% from 2013 to 2018.
- Average monthly salary increased by 2% from 2013 to 2018.

Source: Rosspetsmash-stat, Customs data
Russian manufacturers continue to increase exports

In accordance with the Export Development Strategy for the agricultural engineering industry, Russian agricultural machinery should be delivered to **65 countries** in 2025.

**Expected Results for 2019:**

1. In 2019, it is expected to increase the volume of exports of agricultural machinery to **12.5 billion rubles**.
2. In 2019 **57 Russian manufacturers** of agricultural machinery export products abroad, which is 10% higher than the target indicator of the Strategy (optimistic scenario-52 manufacturers in 2019).
3. In 2019 **26 Russian manufacturers** show equipment at the international exhibition Agritechnica in Germany (there were 16 companies in 2017), in connection with which the exhibition area occupied by Russian companies increased by 18% to 2.0 thousand square meters.
The development of digital farming technologies and the release of new models of agricultural machinery

Autopilot
Yield mapping

Plant nutrition and plant protection

Control the quantity and quality of the crop

Positioning and navigation of agricultural machinery

Agromanagement

ISOBUS

Autopilot
Fertilizing with sowing

Agrophysical and agrochemical studies of the soil

New models

Night Vision System
*Rostselmash*
(silver medal of Innovation Award Agrigritechnica 2019)

The unit for the introduction of liquid fertilizers FDC,
*Eurotechnika*

Self-propelled sprayer
*TUMAN-3*,
*Pegas-Agro*

Telescopic self-propelled loader
PST-3396 and PST-4071
*BDM-Agro*

Selective Combine
*SK-110 Omsk*
experimental plant
The growth of production and economic indicators of the industry and the manufacturability of agricultural machines

**PRODUCTION, billion rubles.**

- 2019: 118
- 2020: 136
- 2025: 239

**THE SHARE OF THE DOMESTIC MARKET, %**

- 2019: 58%
- 2020: 76%
- 2025: 80%

**THE SHARE OF THE DOMESTIC MARKET, %**

- 2019: 42%
- 2020: 24%
- 2025: 20%

**EXPORT, billion rubles**

- 2019: 13
- 2020: 17
- 2021: 19
- 2025: 30

**AGRICULTURAL DEVELOPMENT TRENDS**

Autonomous technology, machine vision, artificial intelligence, big data analysis

**NEW SEGMENTS IN WHICH RUSSIAN MANUFACTURERS WILL INCREASE PRODUCTION**

- small and medium power tractors;
- specialized tractors for orchards and vineyards;
- flax cultivation machinery;
- hemp cultivation machinery;
- equipment for vegetable growing;
- gardening equipment;
- livestock machinery

Source: Russian Agricultural Engineering Development Strategy for the Period until 2030, Export Development Strategy for the Agricultural Engineering Industry for the Period until 2025 (optimistic scenario), company data
THANK YOU FOR YOUR ATTENTION!