

Agricultural Machinery Industry in Germany

- Leely ZHANG, Chief Representative, DLG China

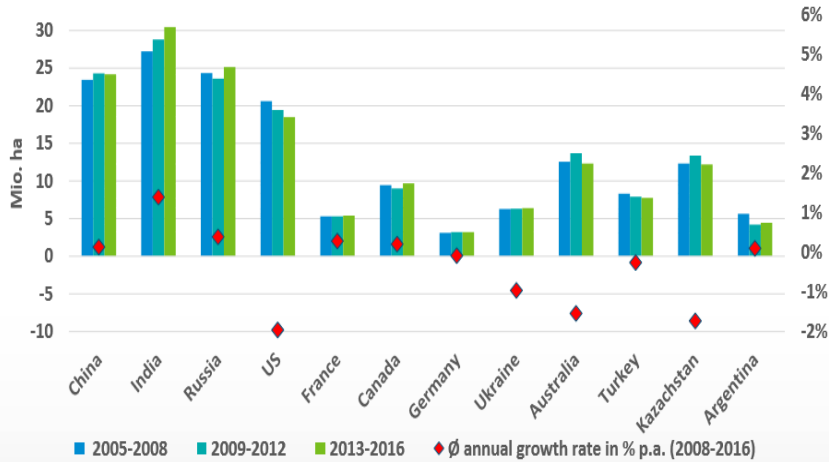


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Global Wheat production

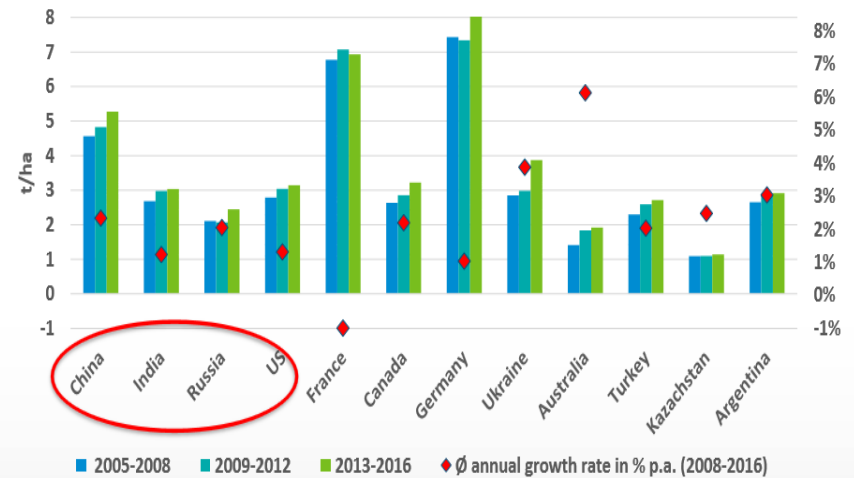
Development of Wheat acreage (in mio. ha)



- India the only country with ongoing and significant growth (>1%)
- Russia with modest increase in acreage
- Wheat acreage more often in decline than on the rise

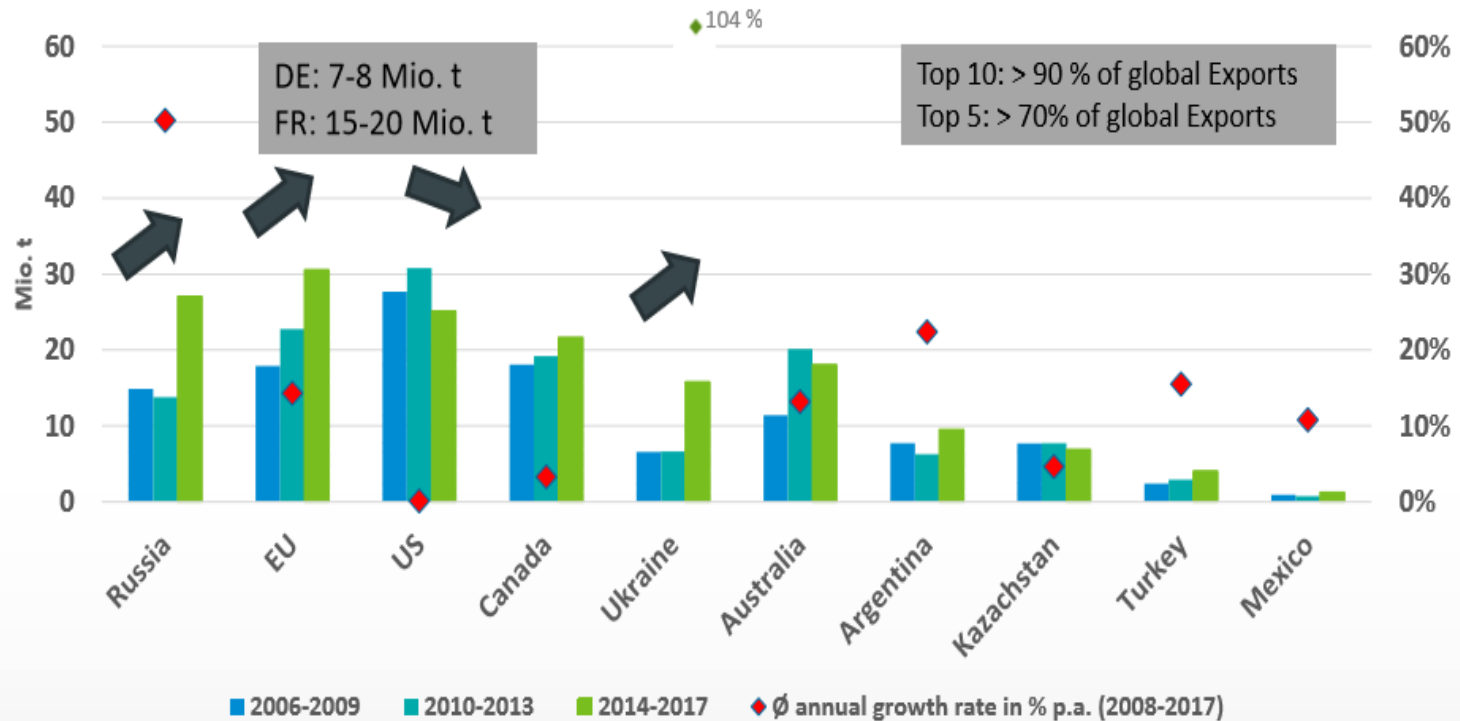
Quelle: FAO; IGC

Evolution of global Wheat yields (t/ha)



- Top producers of wheat are mostly „low-yield-countries“
- Only DE and FR with „high“ yields but stagnating/downward trend
- AU and UA with outstanding yield improvements

Global Wheat Export



- Huge increase of exports from Russia and Ukraine between 2014 - 2017
- US no longer No. 1 in Exports (replacement of Wheat by Corn).
- Abolishment of export taxes shows its effects in Argentina

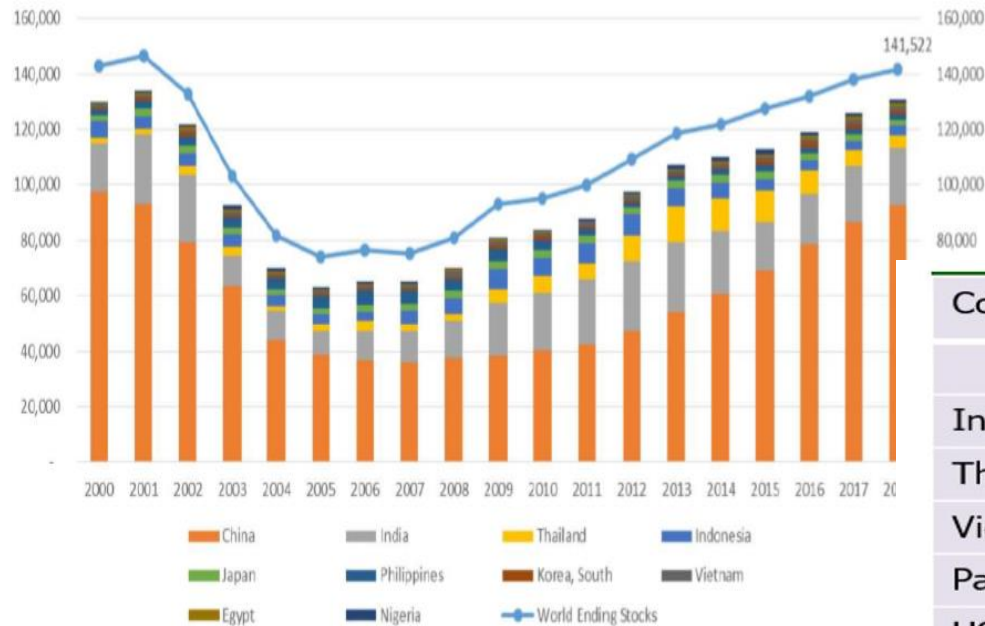
Quelle: FAO; IGC



Impulse für
den Fortschritt 24/10/2018

Global Rice Production:

中国是水稻生产大国，但不是出口国，泰国，越南，巴基斯坦，缅甸是主要出口国

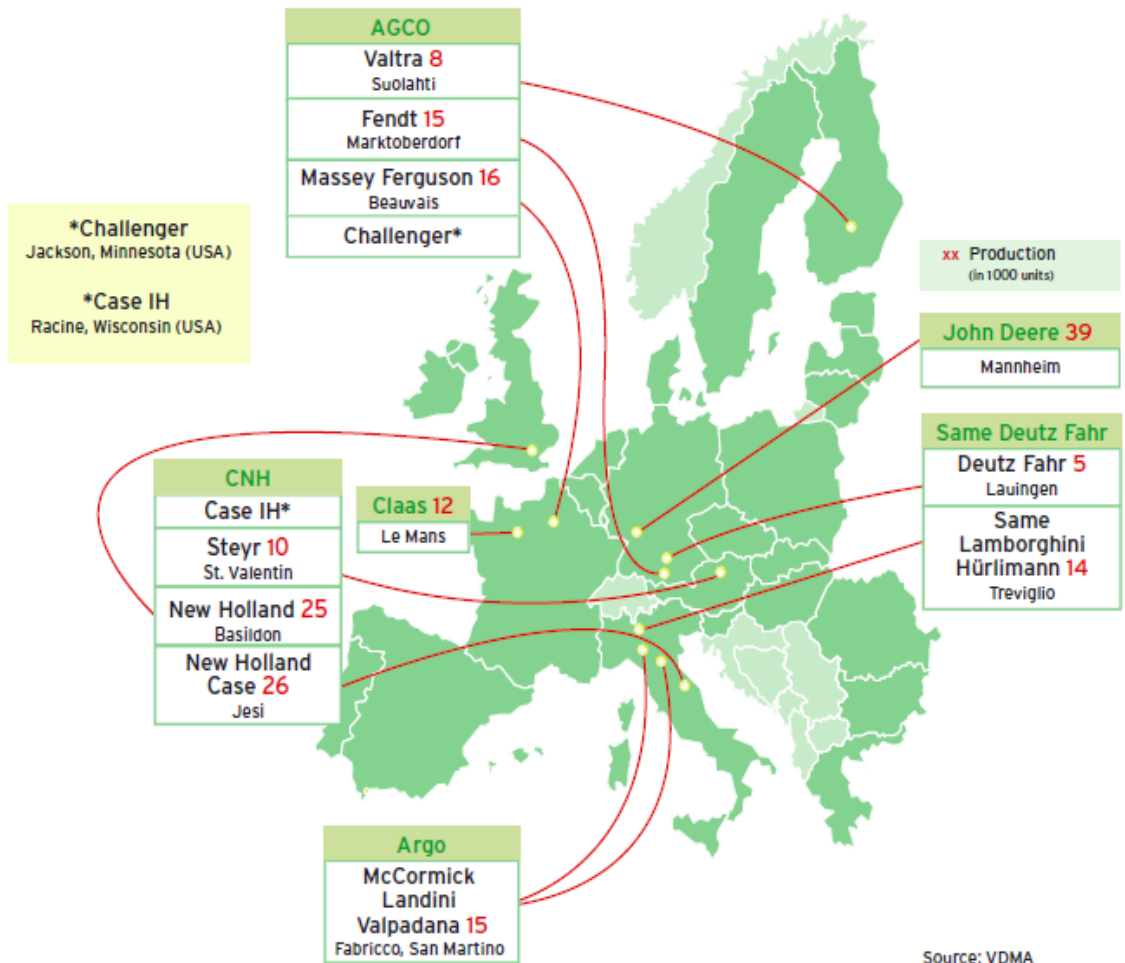


Source: V. Subramanian, The World Rice Trade Conference 2017, The Rice Trader

Countries	2015	2016	2017
Million ton			
India	11.05	10.04	12.56
Thailand	9.78	9.87	11.62
Vietnam	6.61	5.09	6.49
Pakistan	4.0	4.10	3.60
USA	3.38	3.37	3.38
Myanmar	1.74	1.30	3.35
Cambodia	1.15	1.15	1.15
Other	4.94	5.29	5.83
Total	42.65	40.21	47.98

Source: Data from Grain: World Market and Trade, USDA, April 2018

Where is the tractor produced? (unit: 1000)



自动化
减少排气量
减少能耗
装备与拖拉机的
配合

Source: VDMA

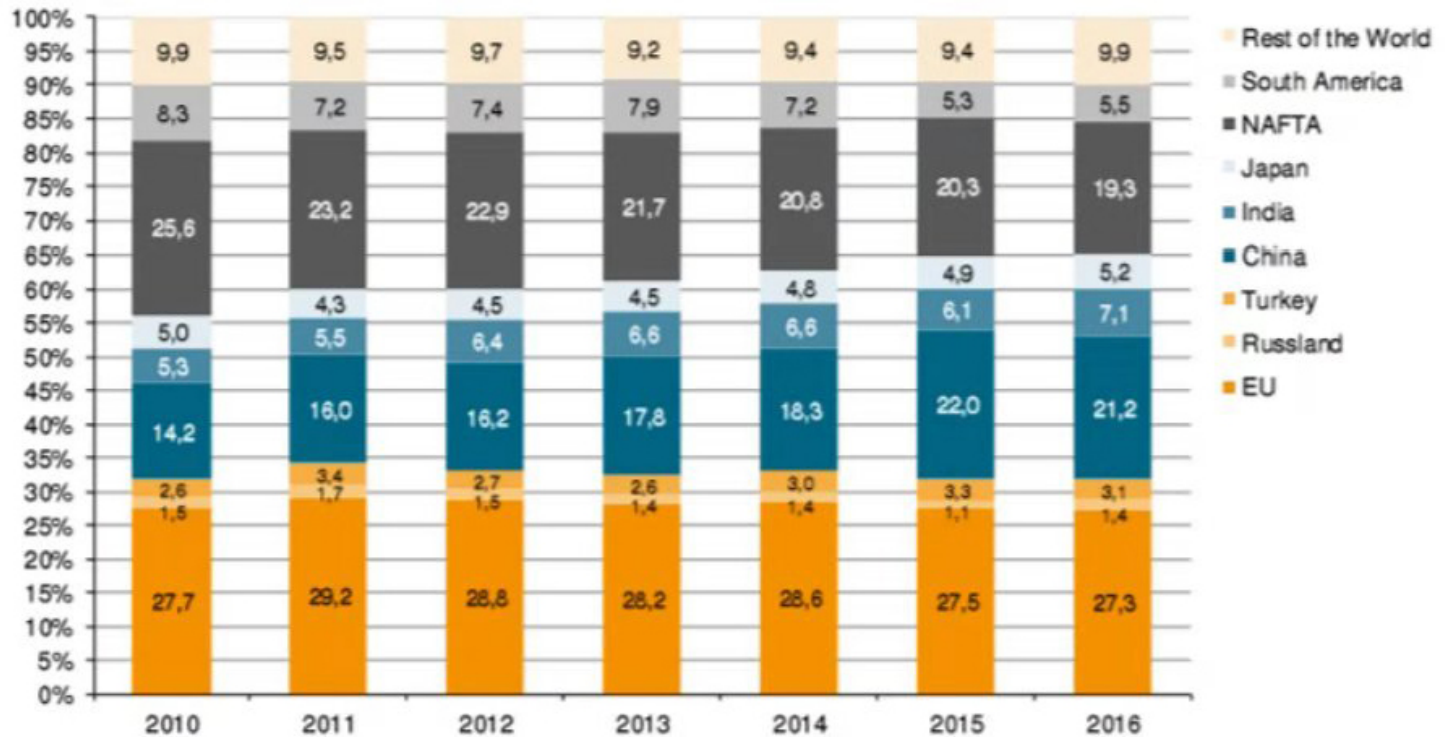


Distribution of global agricultural machinery producers

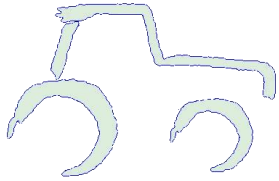
Western Europe remains the leading producer



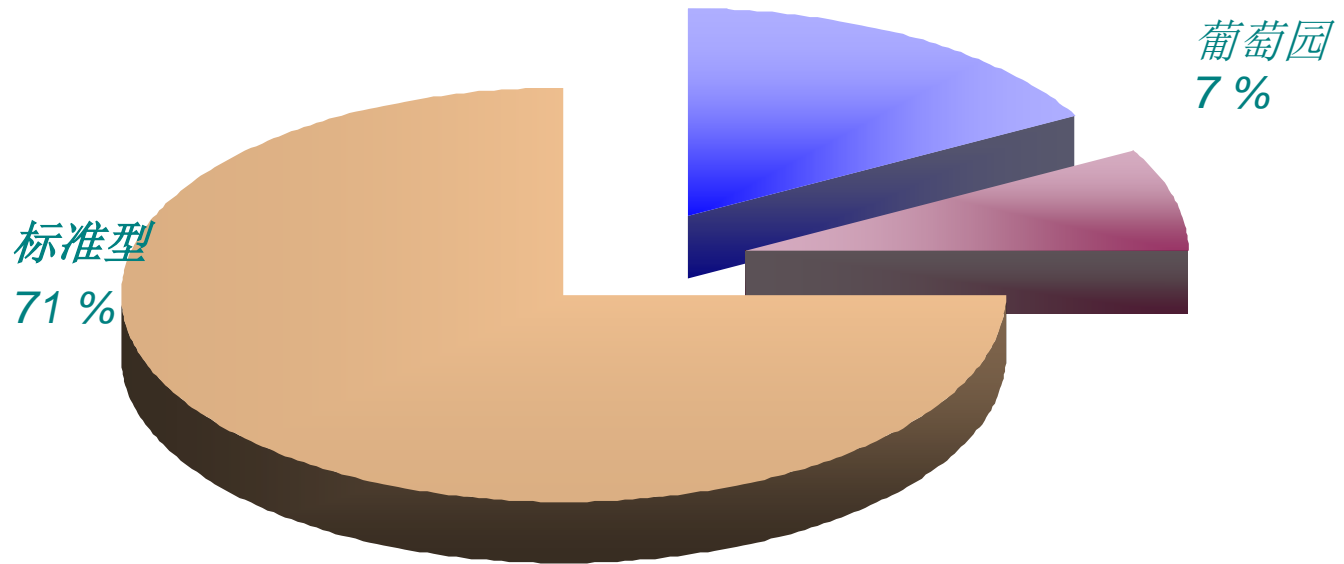
Distribution of the worldwide Production Volume in %



Tractor end users in EU

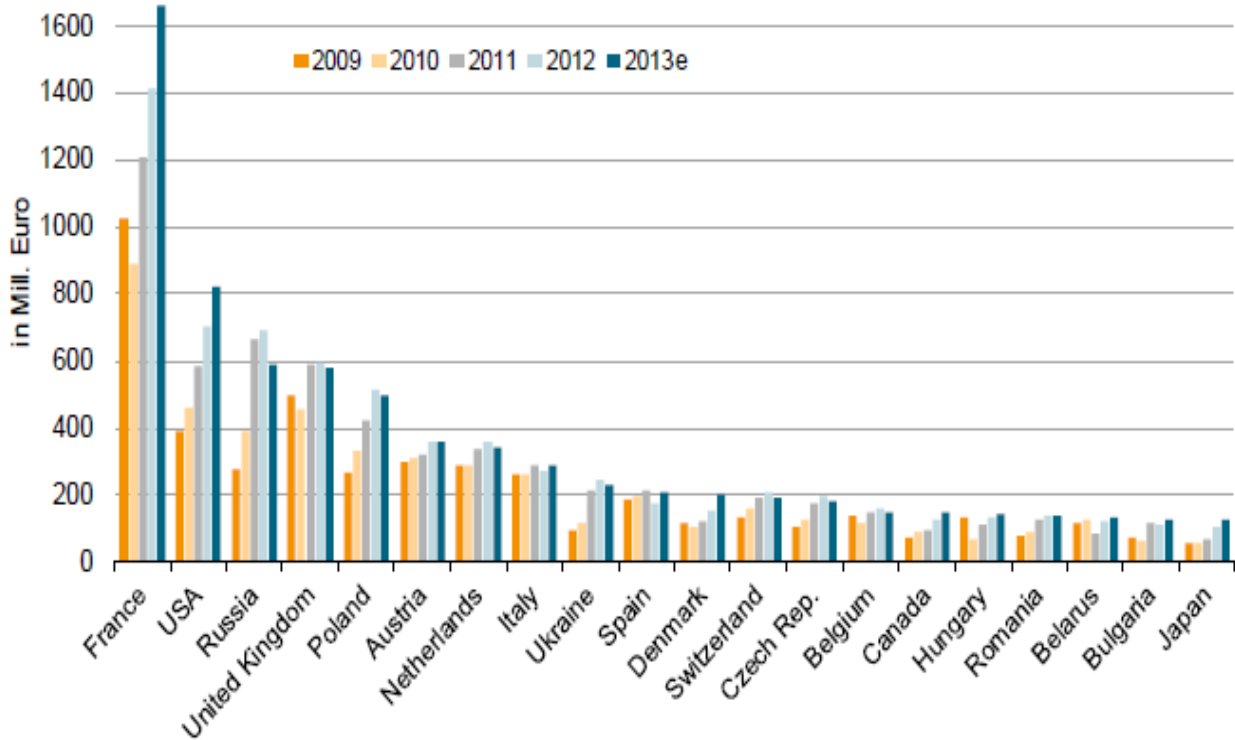


其它：伸缩臂式——园艺用
22 %



平均马力：130 hp

Germany export of tractors



美国，俄罗斯，英国，法国，德国，是五大农业出口国。

Source: agrifuture

Dealers in Germany

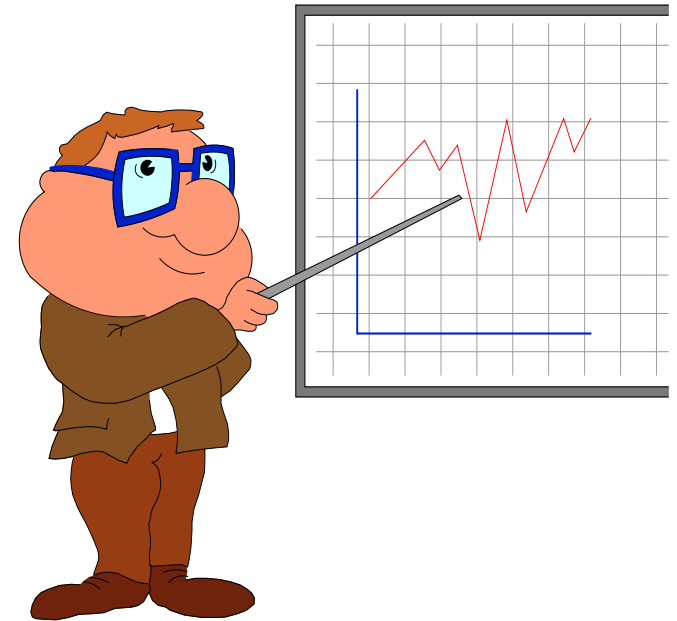


- Average staff: 18
 - Technician: 10
 - admin: 2
 - sales: 3
 - accounting: 3

Dealers in Germany

revenue: 4 (m. Euro)

- New machine: 2.3
- Second hand: 0.6
- Spare parts: 0.8
- 车inventory: 0.2
- others: 0.1

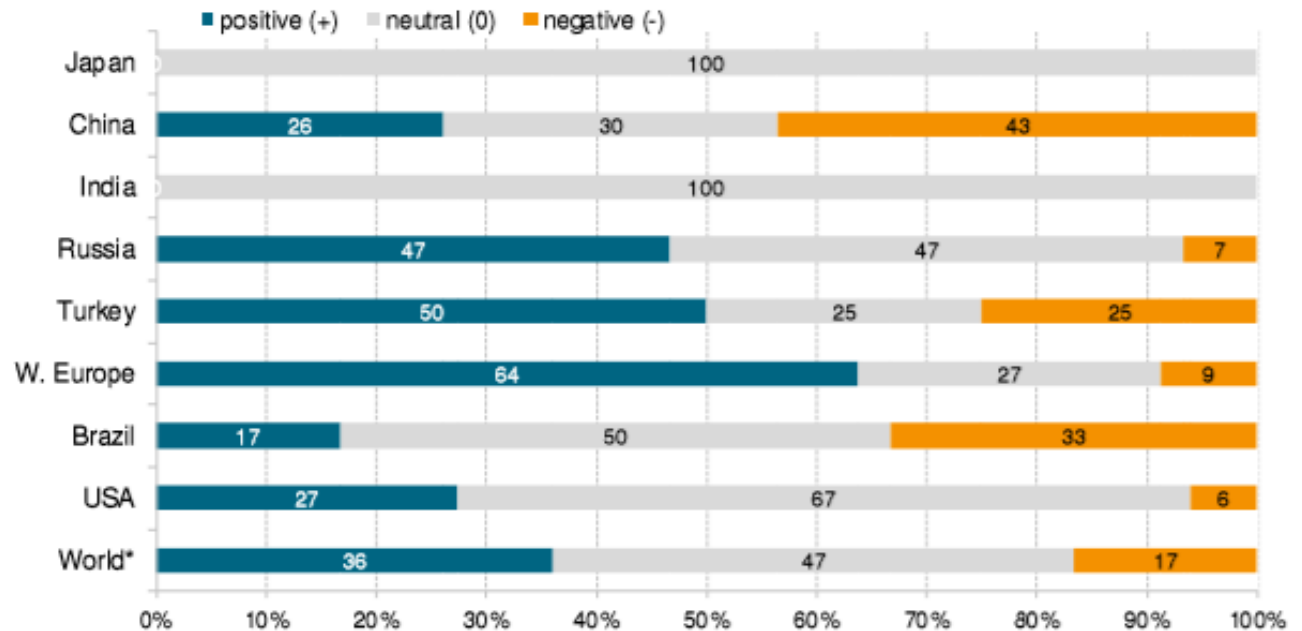


Animal production serves currently as the main driver



Question: Please give a current evaluation of the following aspects/impacts for the farmers / end customers in your home market: **Animal production (incl. dairy products)**

Answers from manufacturers / importers according to location



Source: Agrievolution Business Barometer Oct 2017

*weighted global average



Impulse für den Fortschritt

24/10/2018

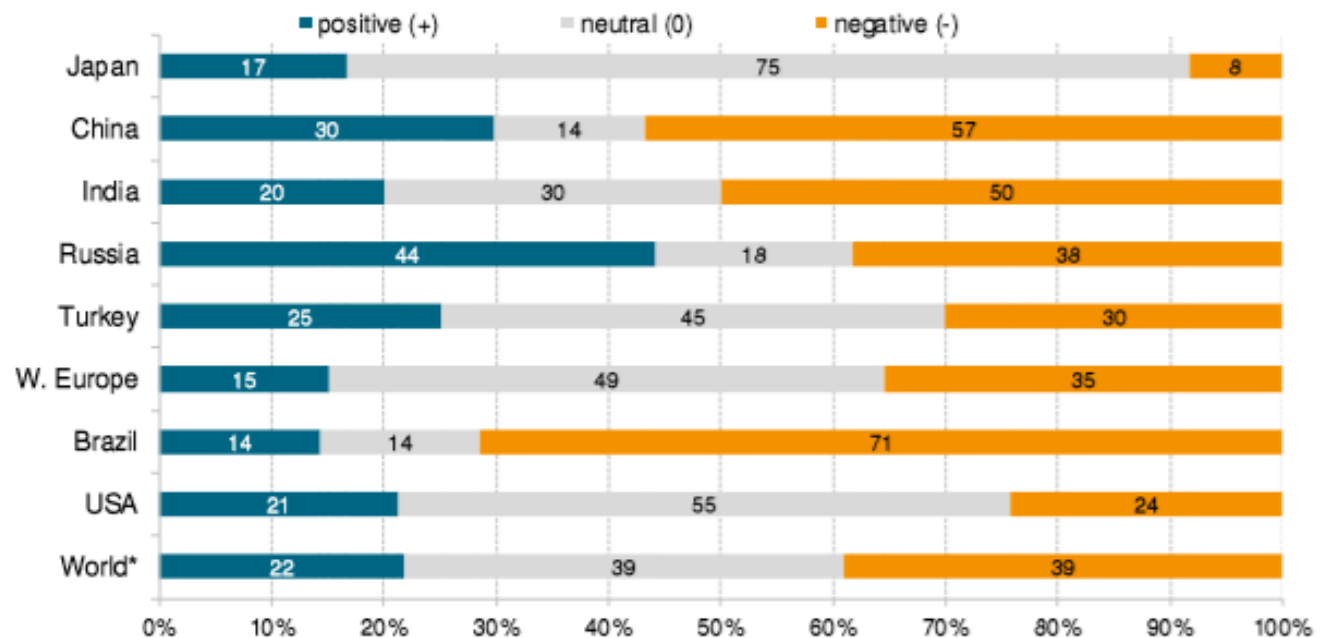
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Crop production currently has a braking effect



Question: Please give a current evaluation of the following aspects/impacts for the farmers / end customers in your home market: **Crop production (prices, quantities, quality)**

Answers from manufacturers / importers according to location

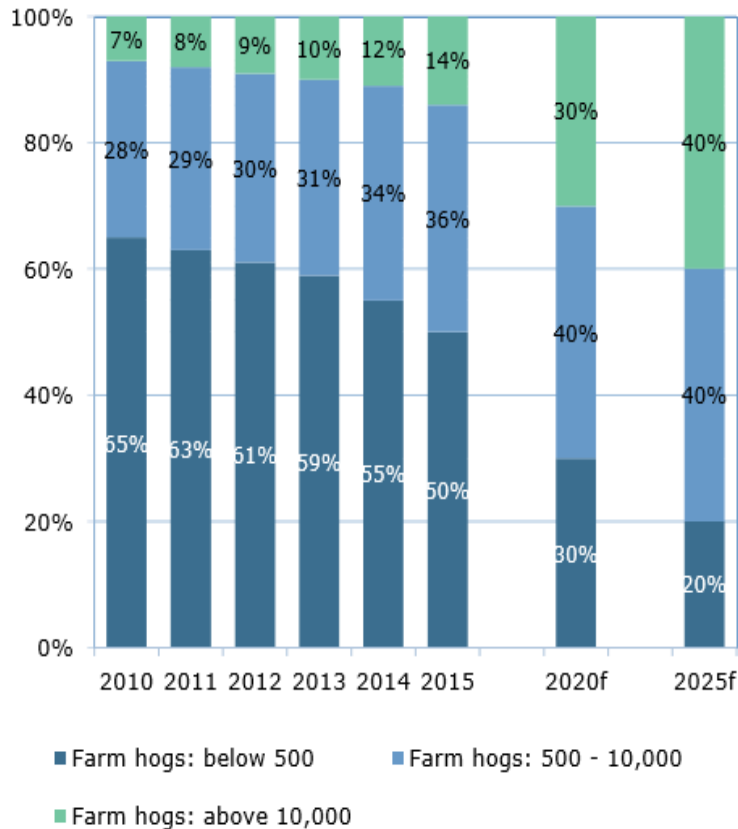


Source: Agrievolution Business Barometer Oct 2017

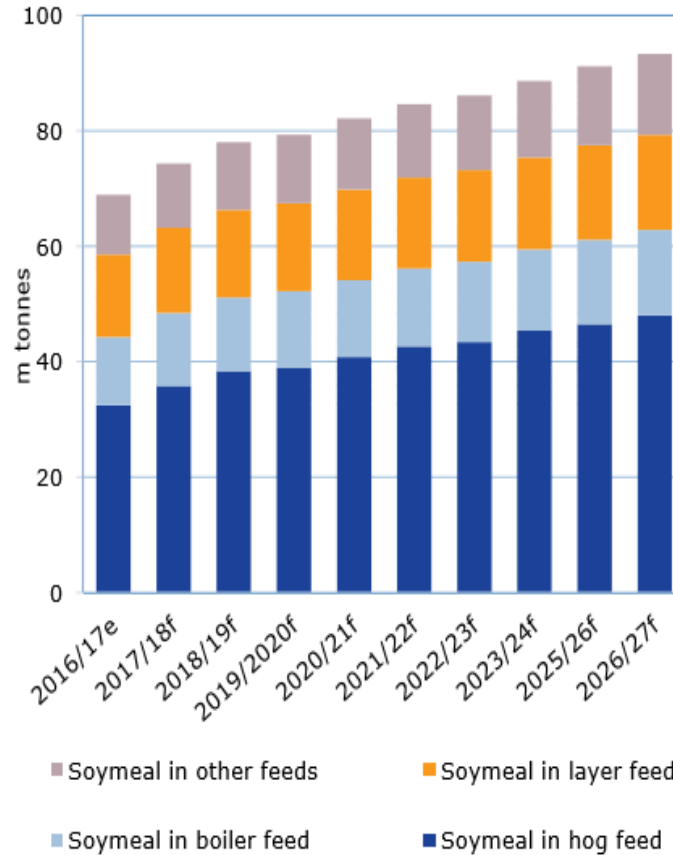
*weighted global average

畜牧业的发展极大的刺激着种植业

Structural shift in hog rearing is a key driver for soymeal demand



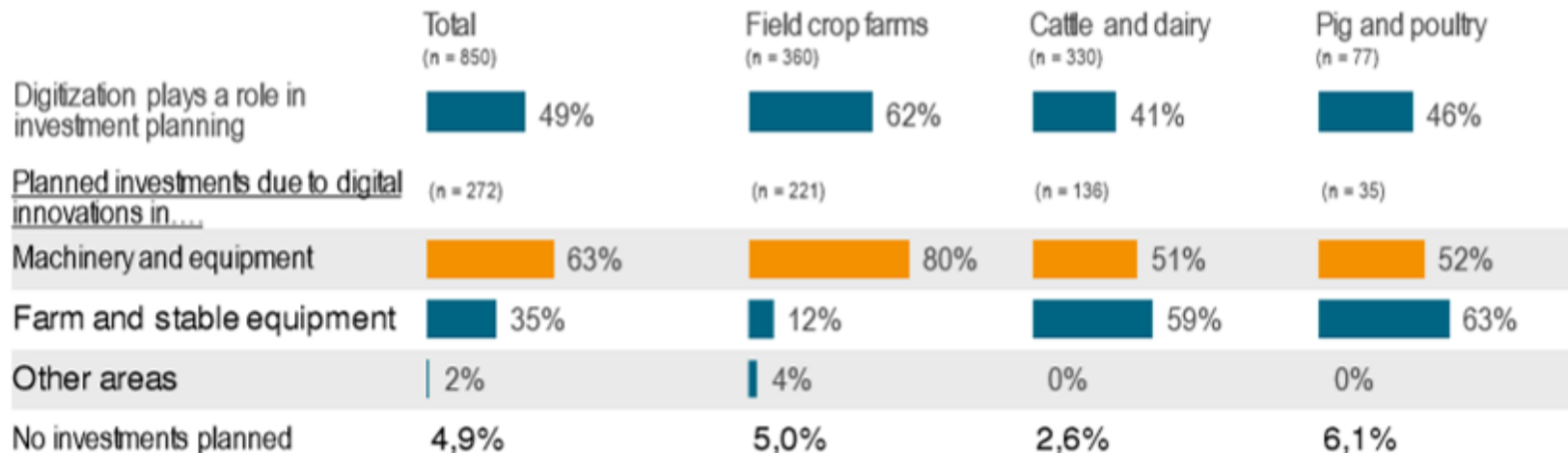
Soymeal consumption is to grow by 3% in the next decade



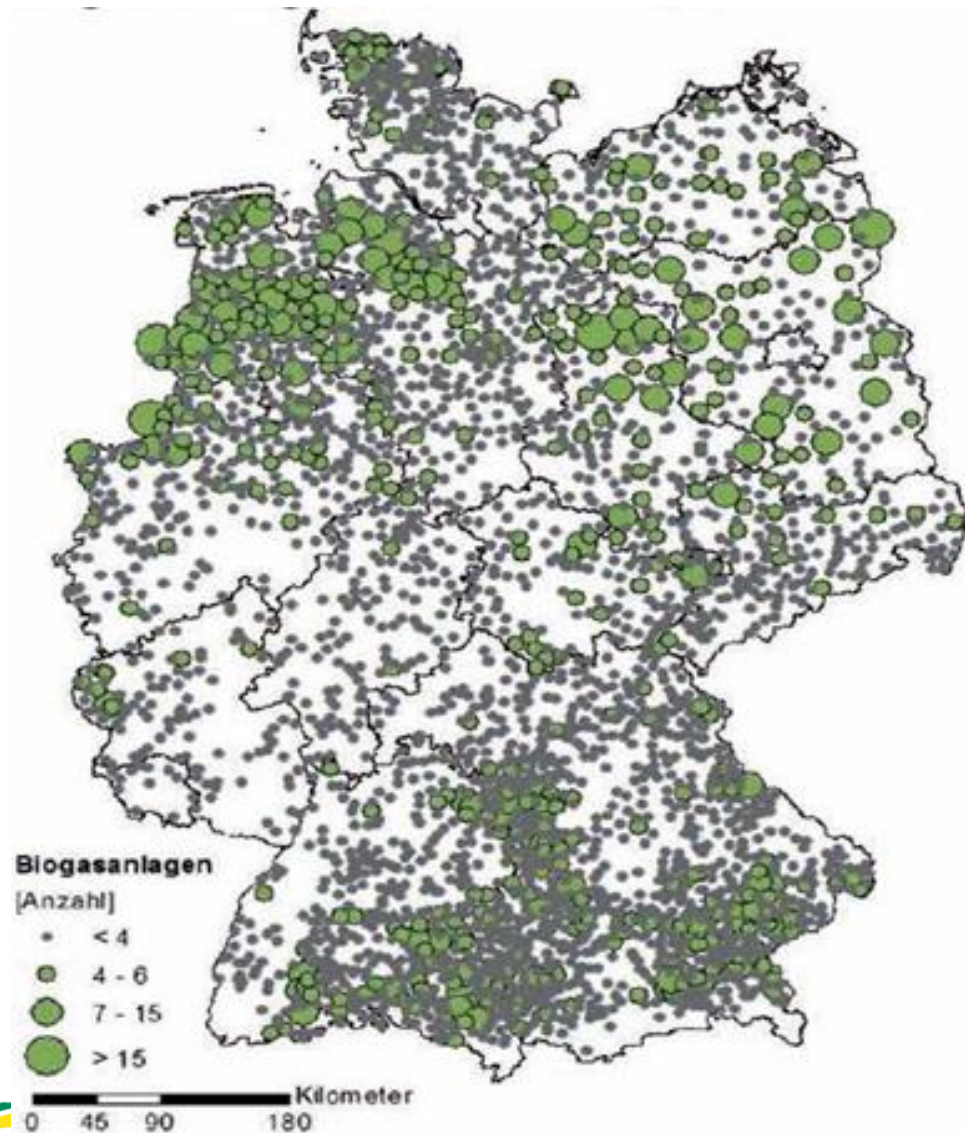
Digitisation serves as the decisive future driver



Planned investment areas due to digital innovation within the next 2-3 years - by type of business



New type of farm in Germany, Biogas plant



- 11%的可再生能源是由农业生产（沼气池，太阳能发电）
- 75%的沼气发电厂（72900兆瓦）和25%的太阳能发电厂（3200 MW）

都是由农场主经营



Bundesministerium für
Ernährung, Landwirtschaft
und Verbraucherschutz



JOINT GERMAN-CHINESE DEMONSTRATION FARM



International

AFC

Agriculture & Finance Consultants

PPP projects



Ukraine



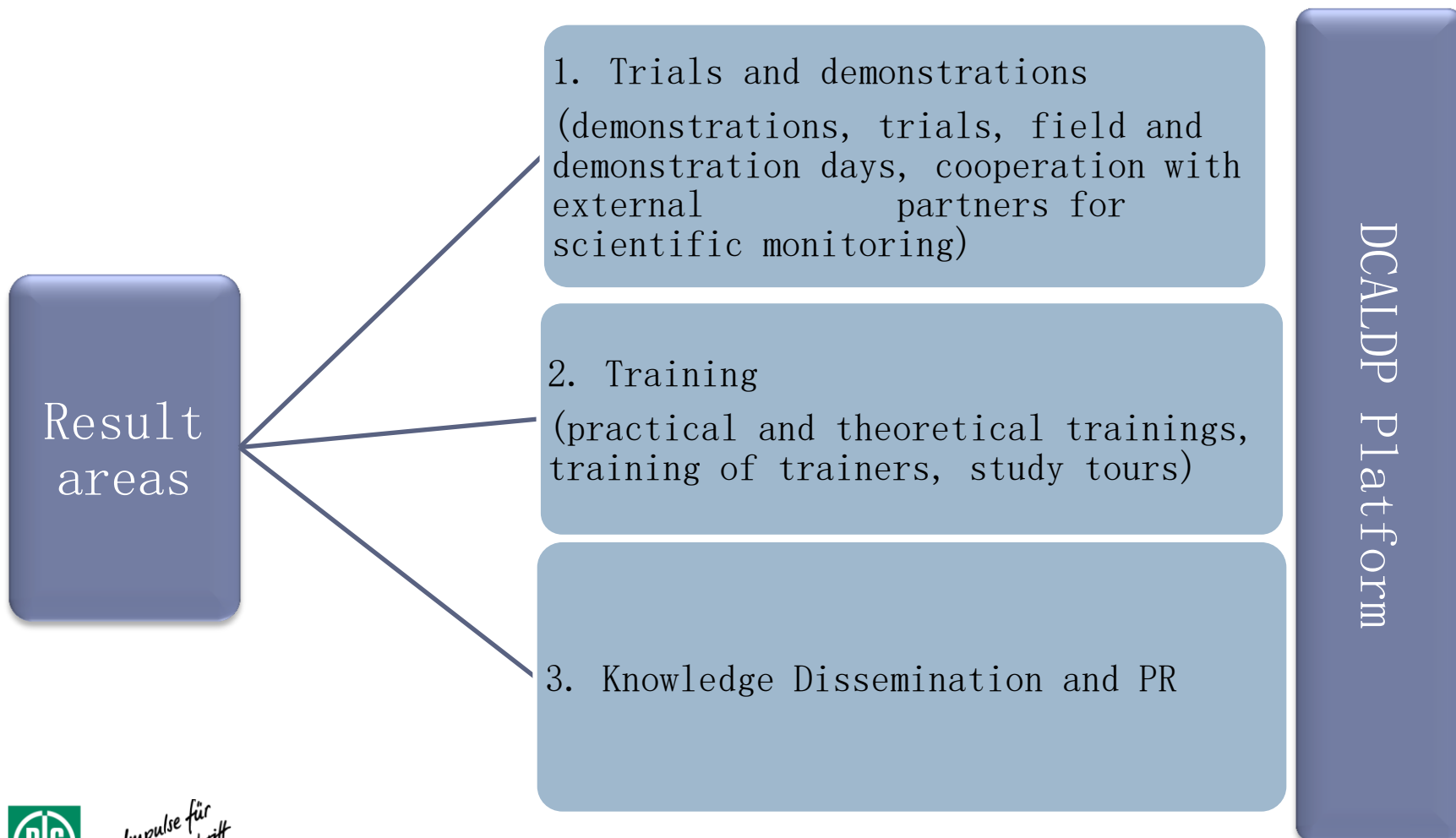
Zambia



Mongolia



3 Main Project Result Areas



Thank you for attention

Leely ZHANG
Managing Director
DLG China
+86 10 6590 6120
Email: Leely@DLG.org.cn