



AGRICULTURAL MACHINERY
QUARTERLY REPORTS

VDMA Agricultural Machinery Production

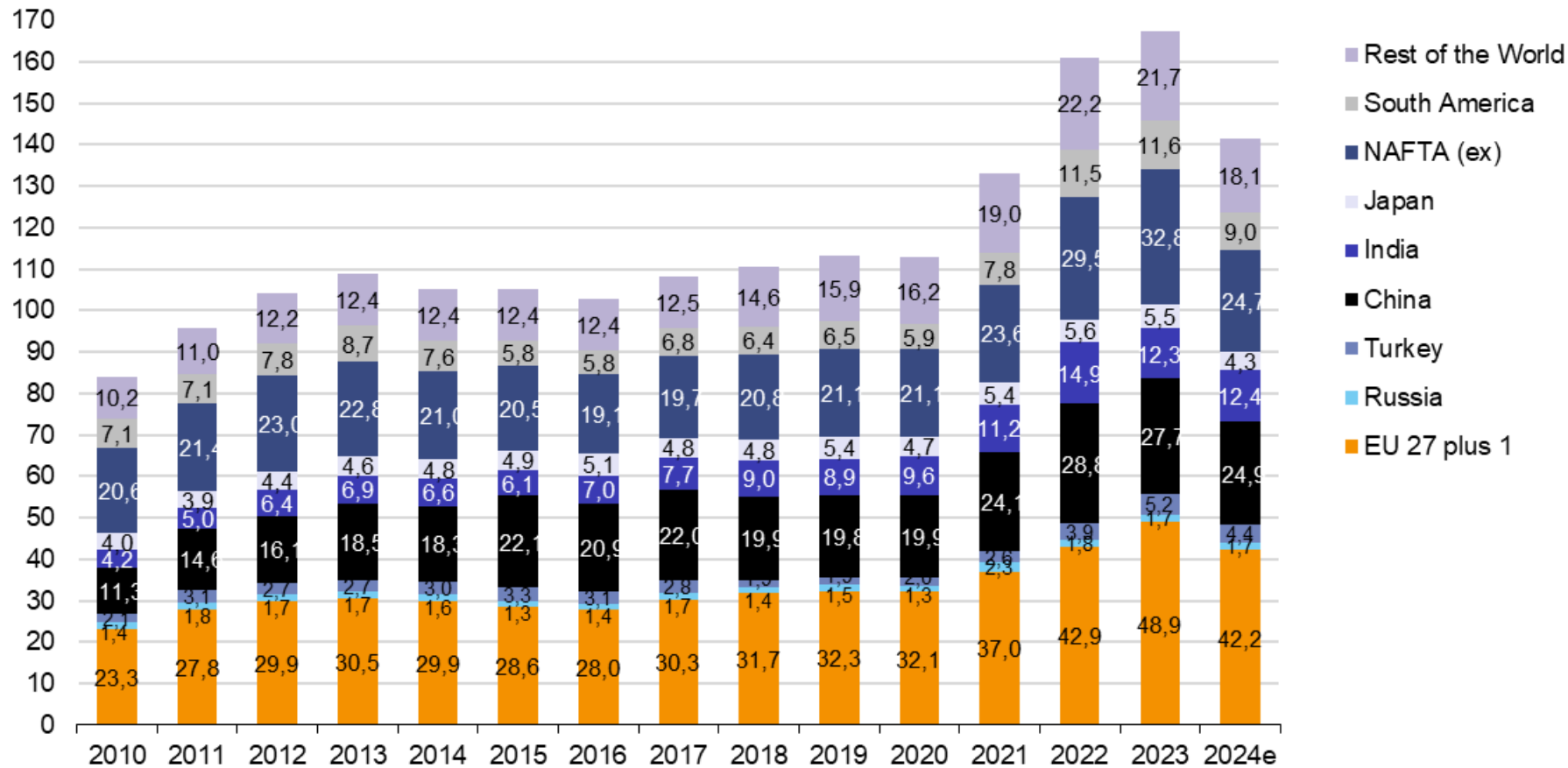
STATUS AUGUST 2025, PHILIP NONNENMACHER

ADVANCING EUROPE'S MACHINERY INDUSTRY



01 Worldwide Production

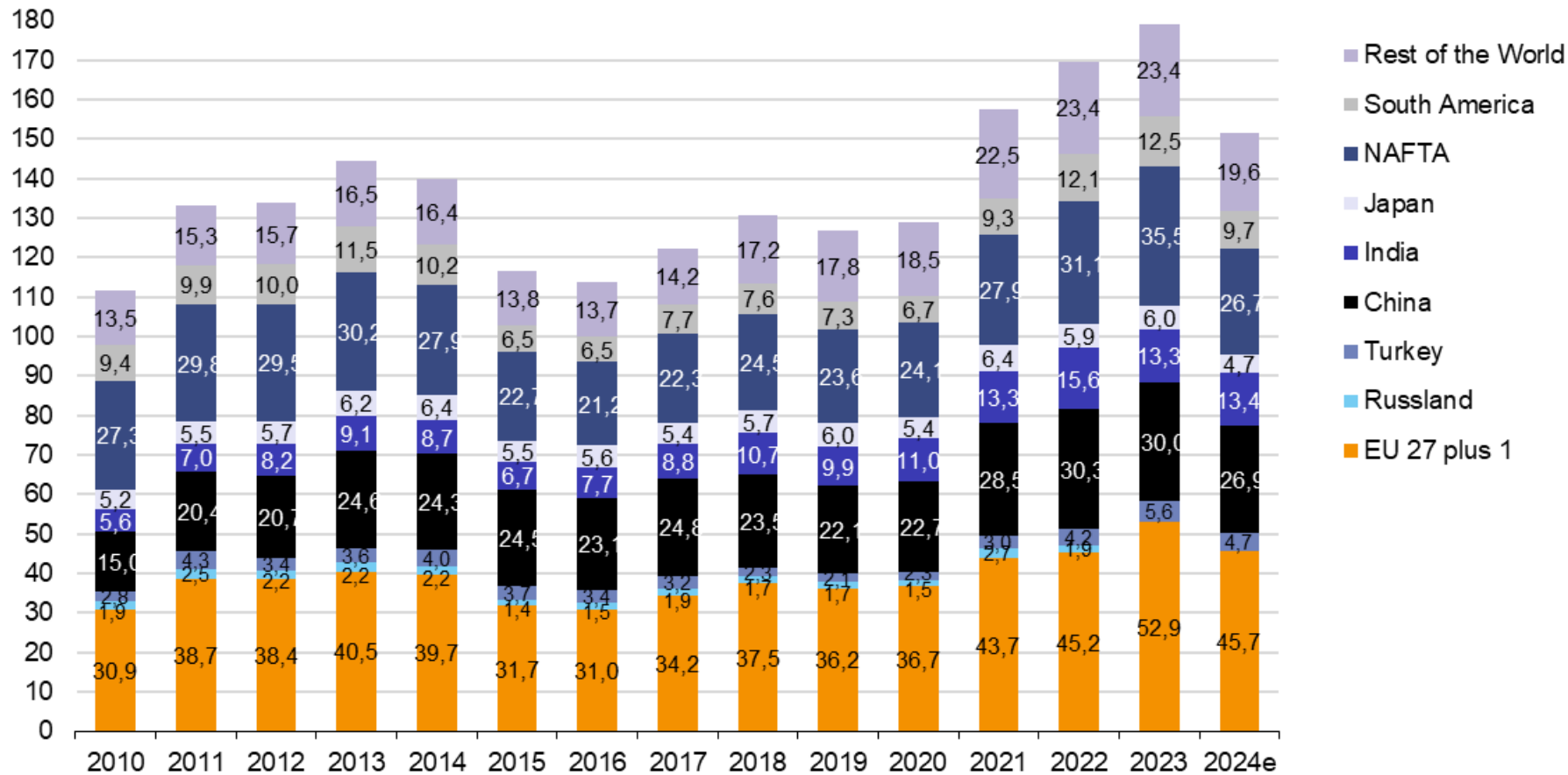
Production Volumes in Billion Euro



Main assumptions:

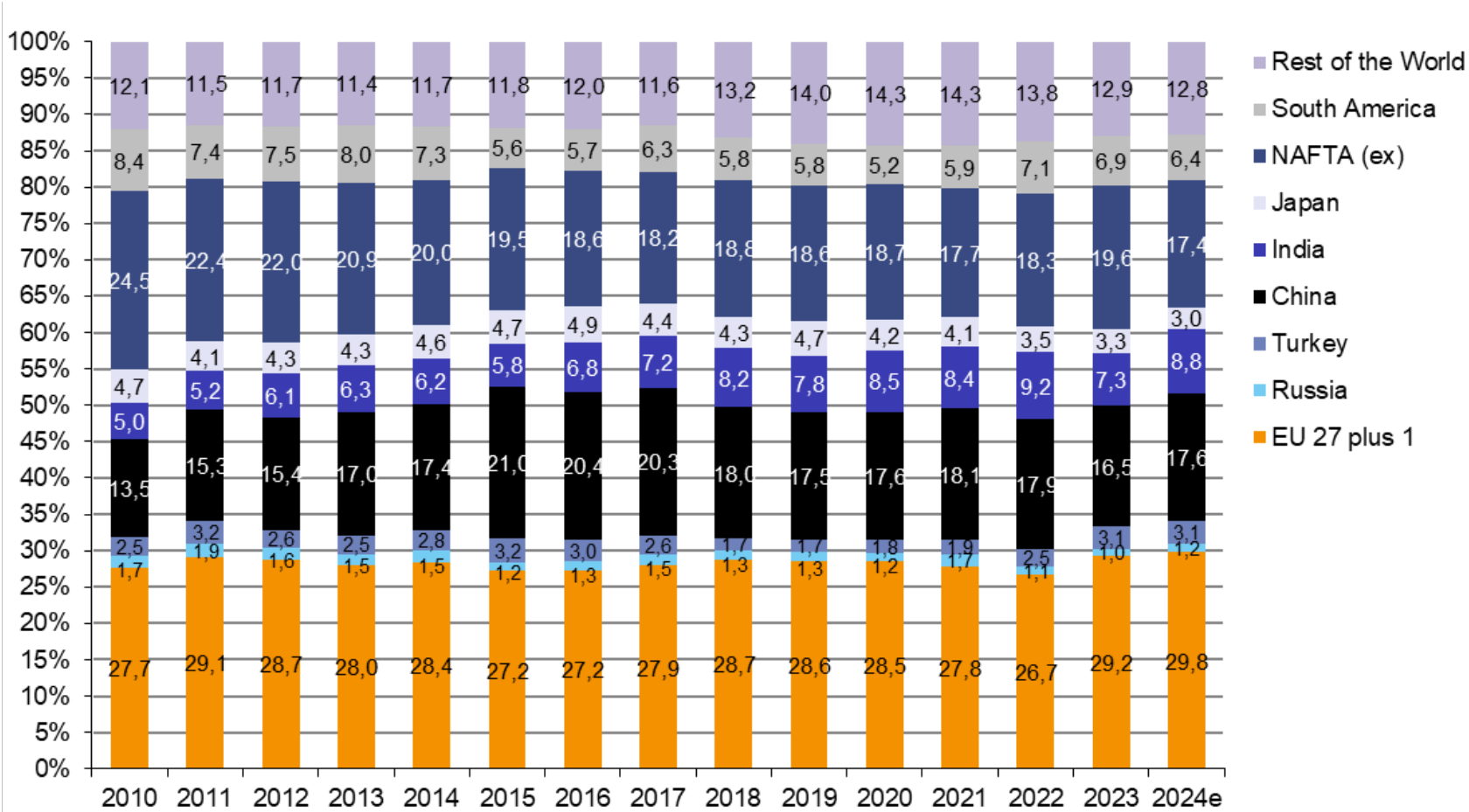
- Converted at annual average currency exchange rates

Production Volumes in Billion US-Dollar



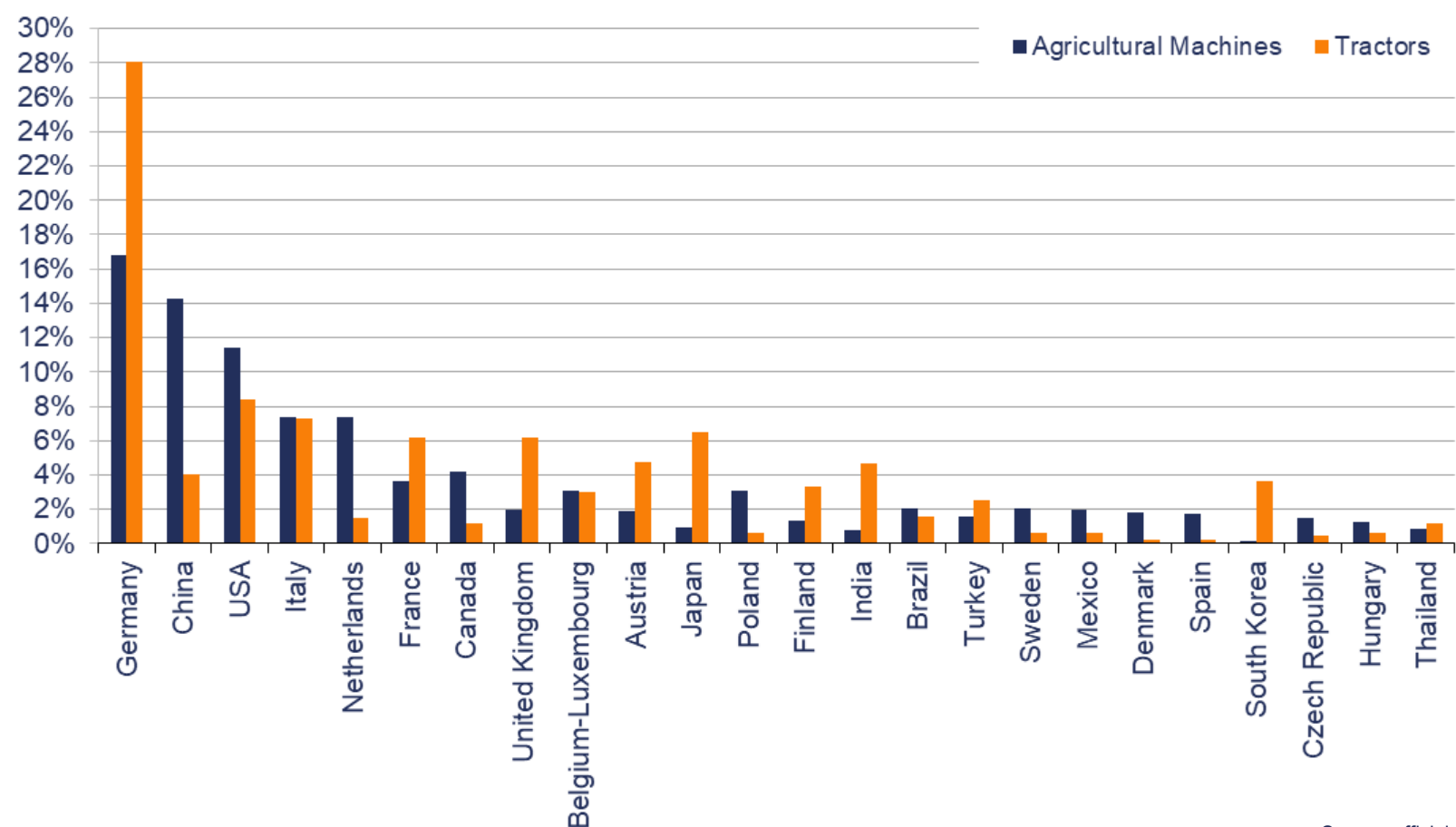
Main assumptions:
 • Converted at annual average currency exchange rates

Production Volume Distribution in %



Source: VDMA Agricultural Machinery, August 2025

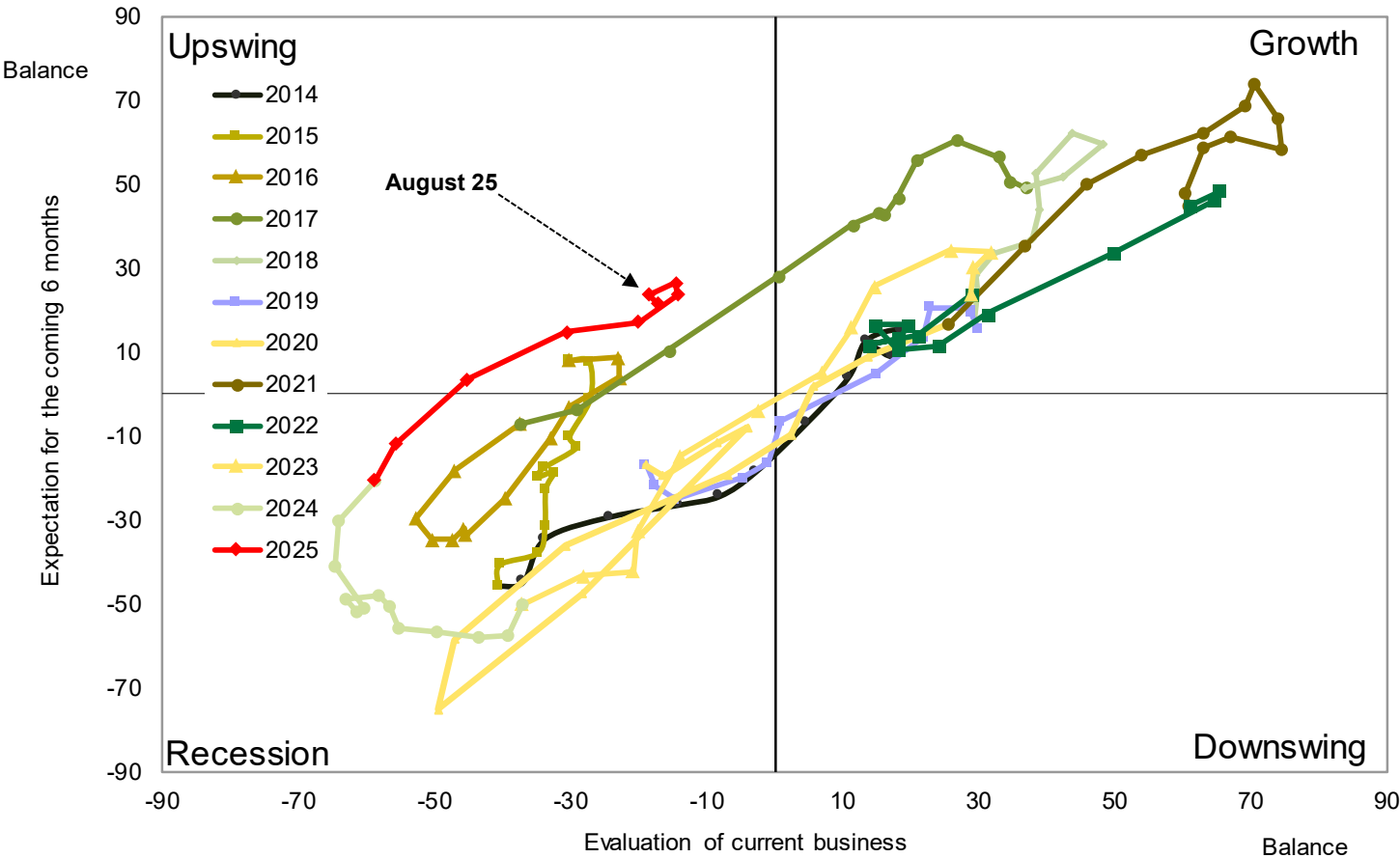
Global Ag Machinery export volume share for 2024 in %



Source: official national statistics, VDMA, August 2025, total of the exports from 52 countries

2022 Production in Europe

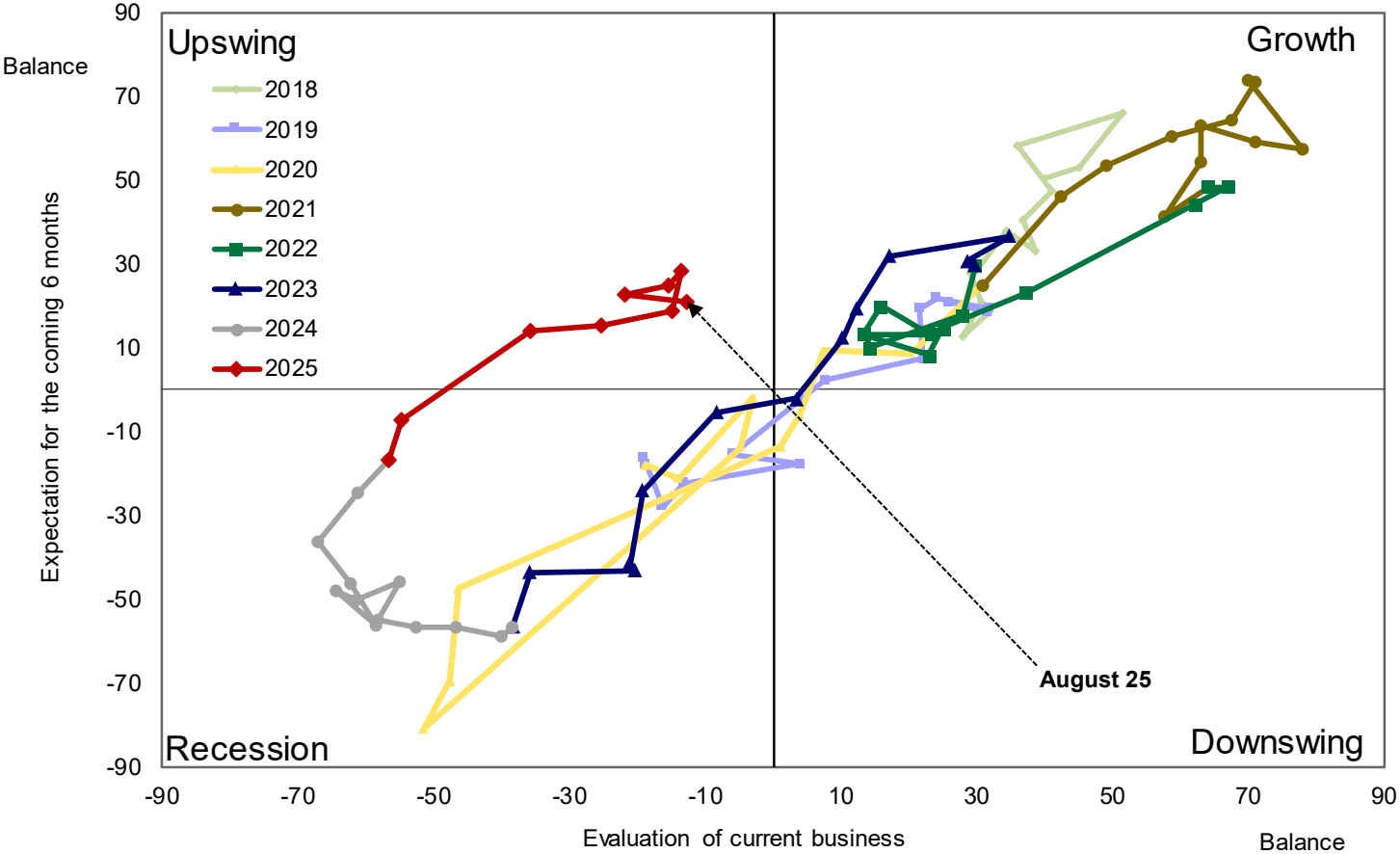
Business Climate



Each value as an average of the last two month

Source: CEMA Business Barometer, August 2025

Business Climate

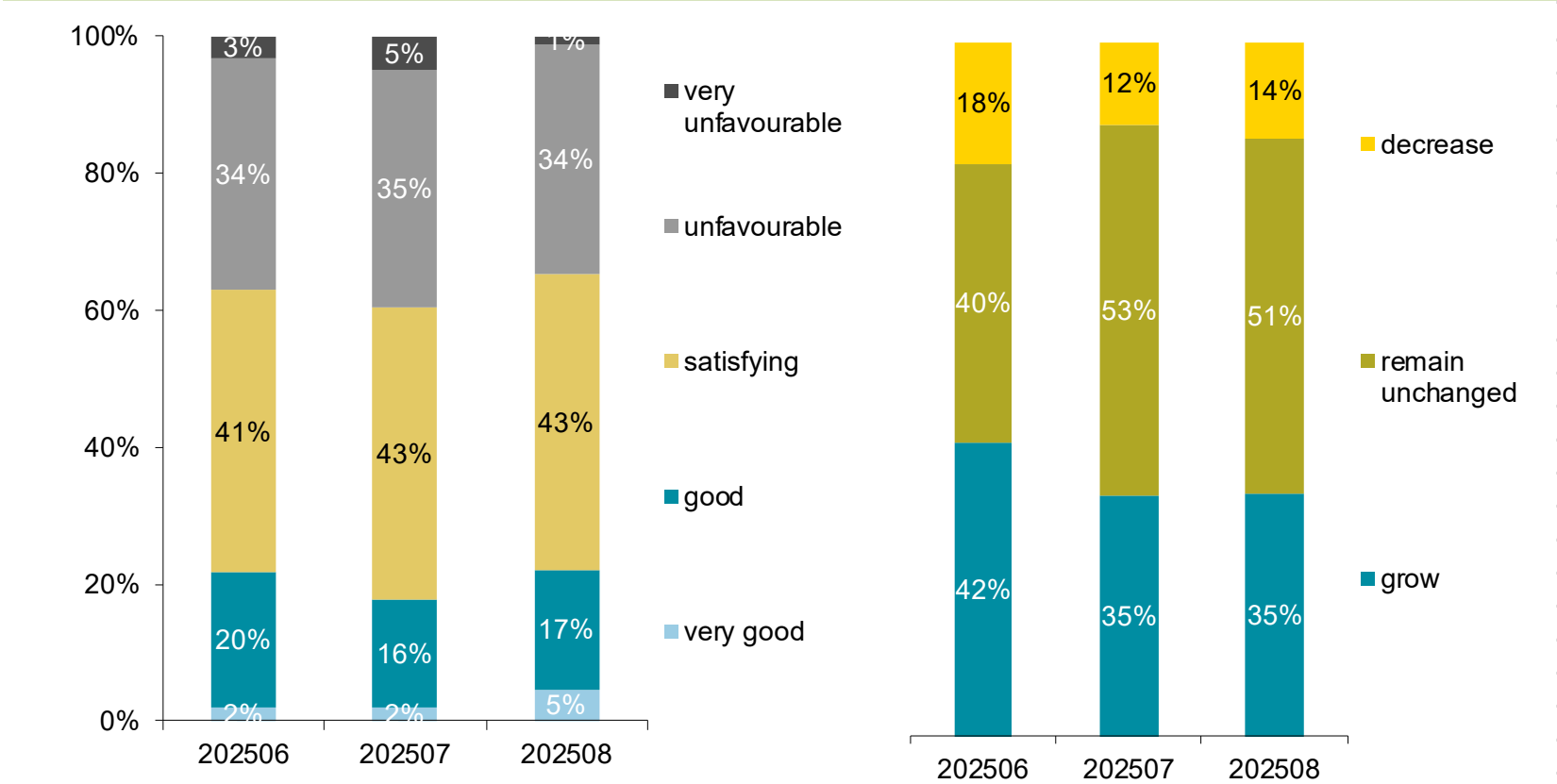


Source: CEMA Business Barometer, August 2025

Business Climate

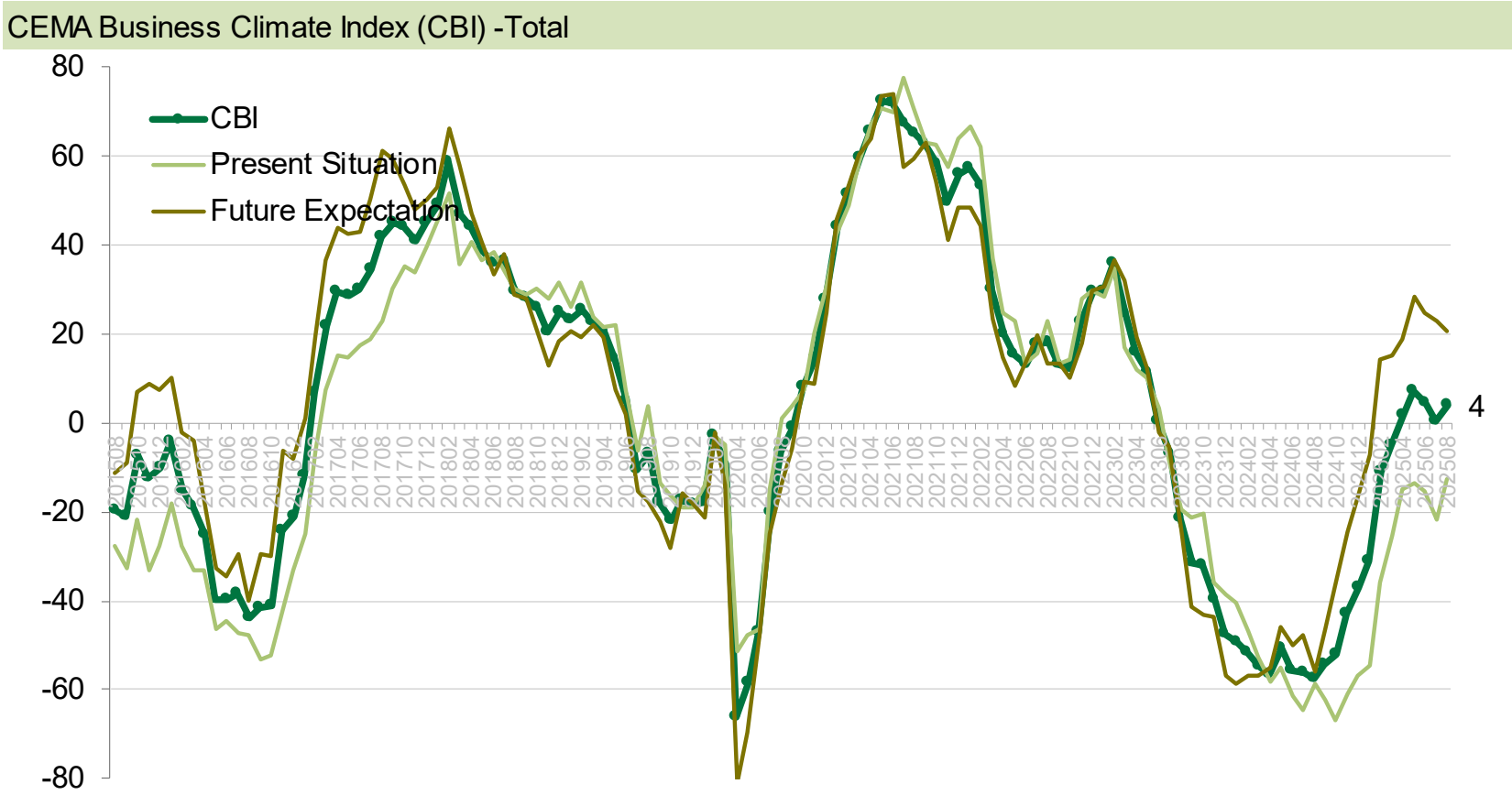
Question: We consider our current business to be
....

Question: We expect our overall turnover within the
next 6 months to....



Source: CEMA Business Barometer, August 2025

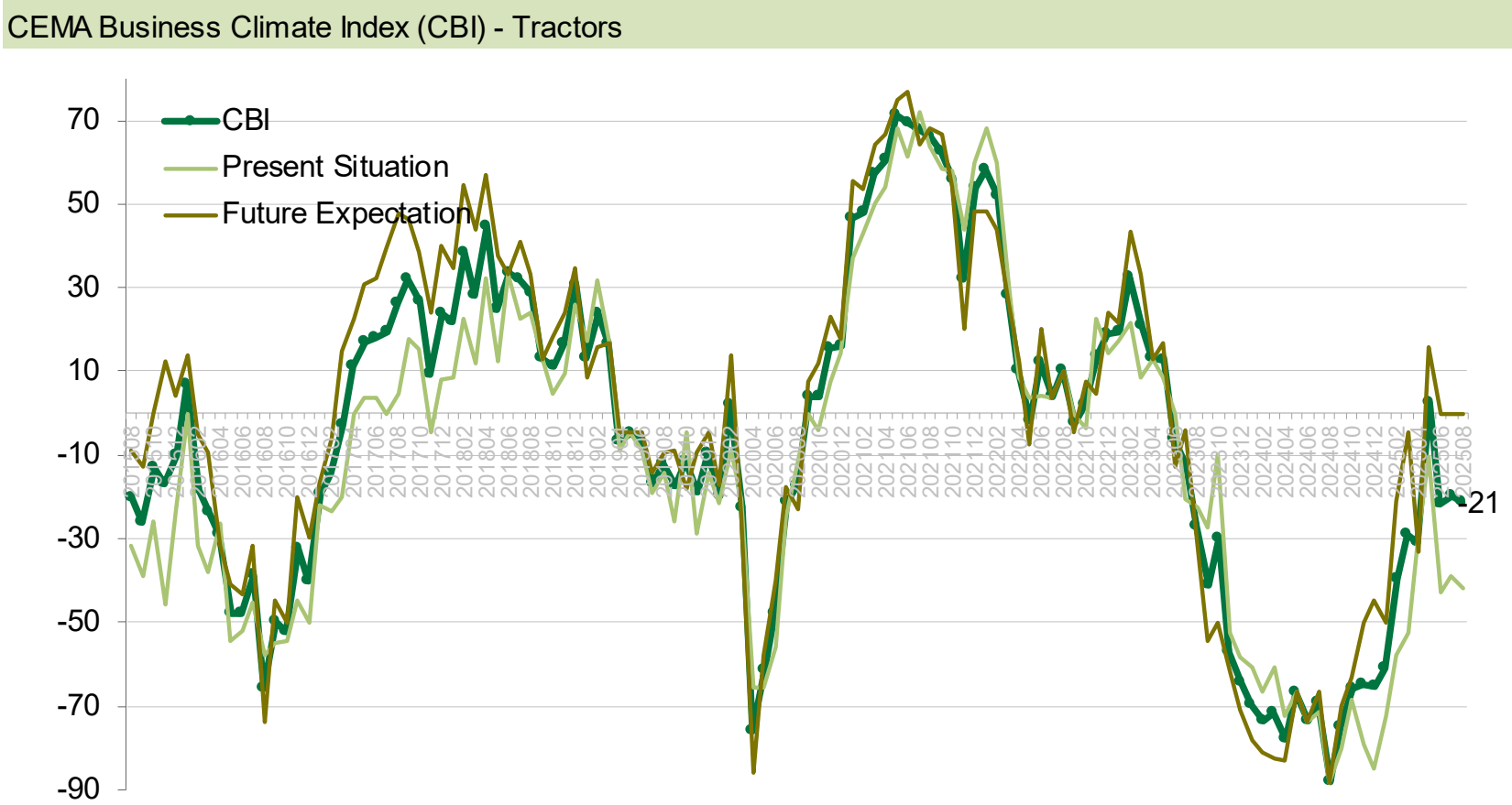
Business Climate



CBI = geometric mean of 1) evaluation of the current business situation and 2) turnover expectation; Index scale from -100 to +100; positive index for 1) = majority of respondents evaluates the current situation as favourable and vice versa; positive index for 2) = majority of respondents expects for the next six months an increasing turnover and vice versa (respectively compared to the previous year's level)

Source: CEMA Business Barometer, August 2025

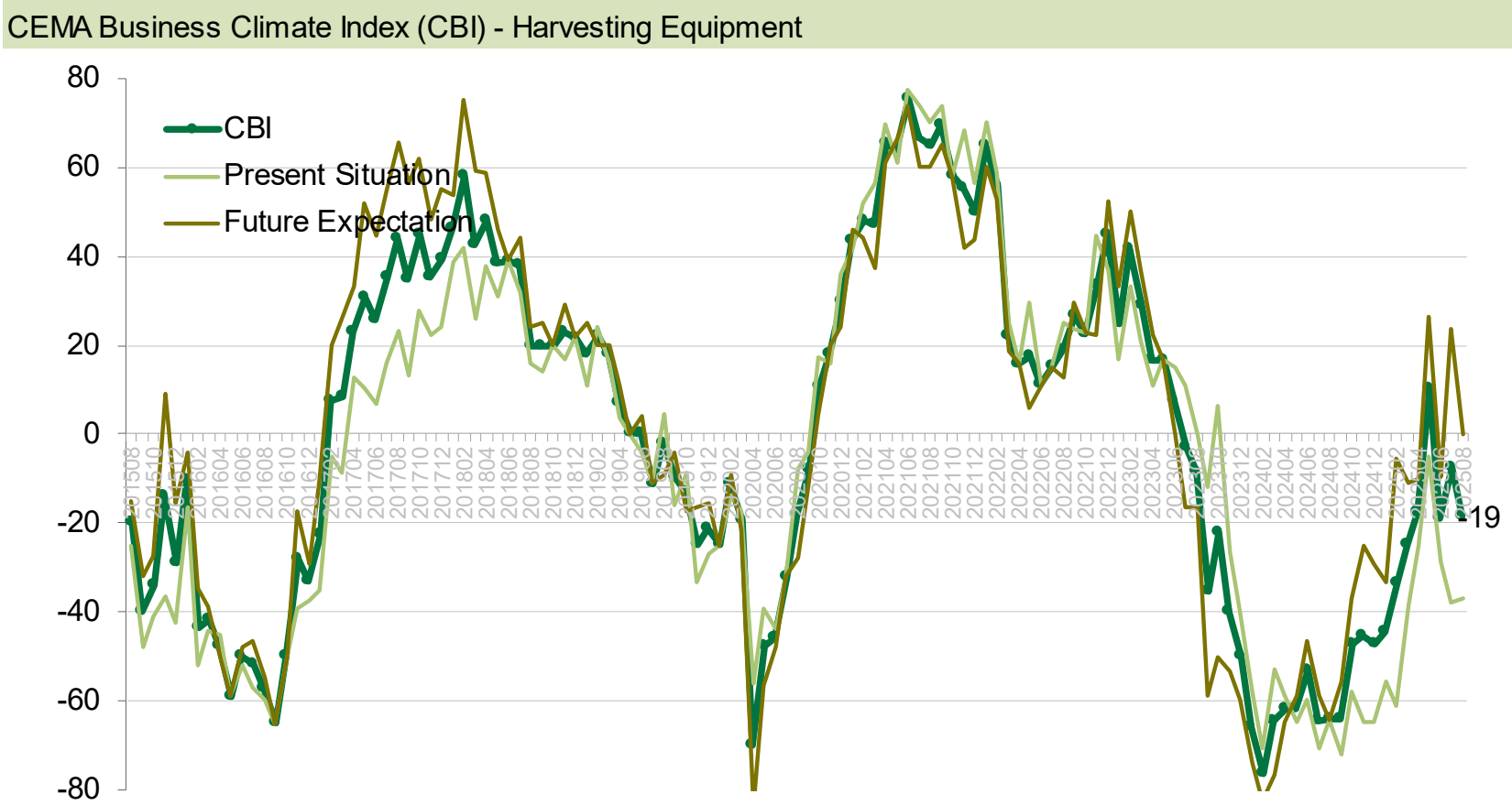
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Source: CEMA Business Barometer, August 2025

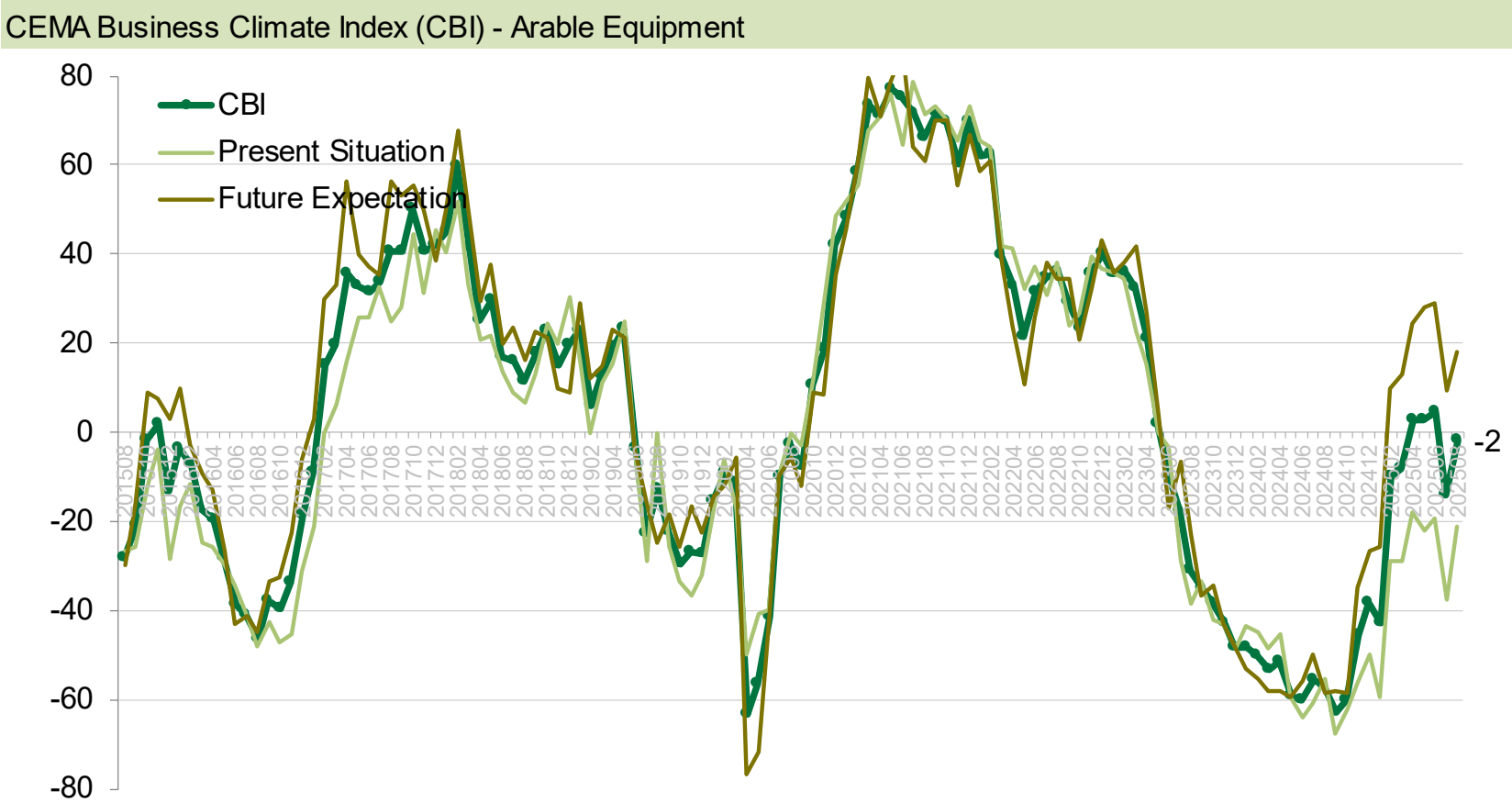
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Source: CEMA Business Barometer, August 2025

Business Climate

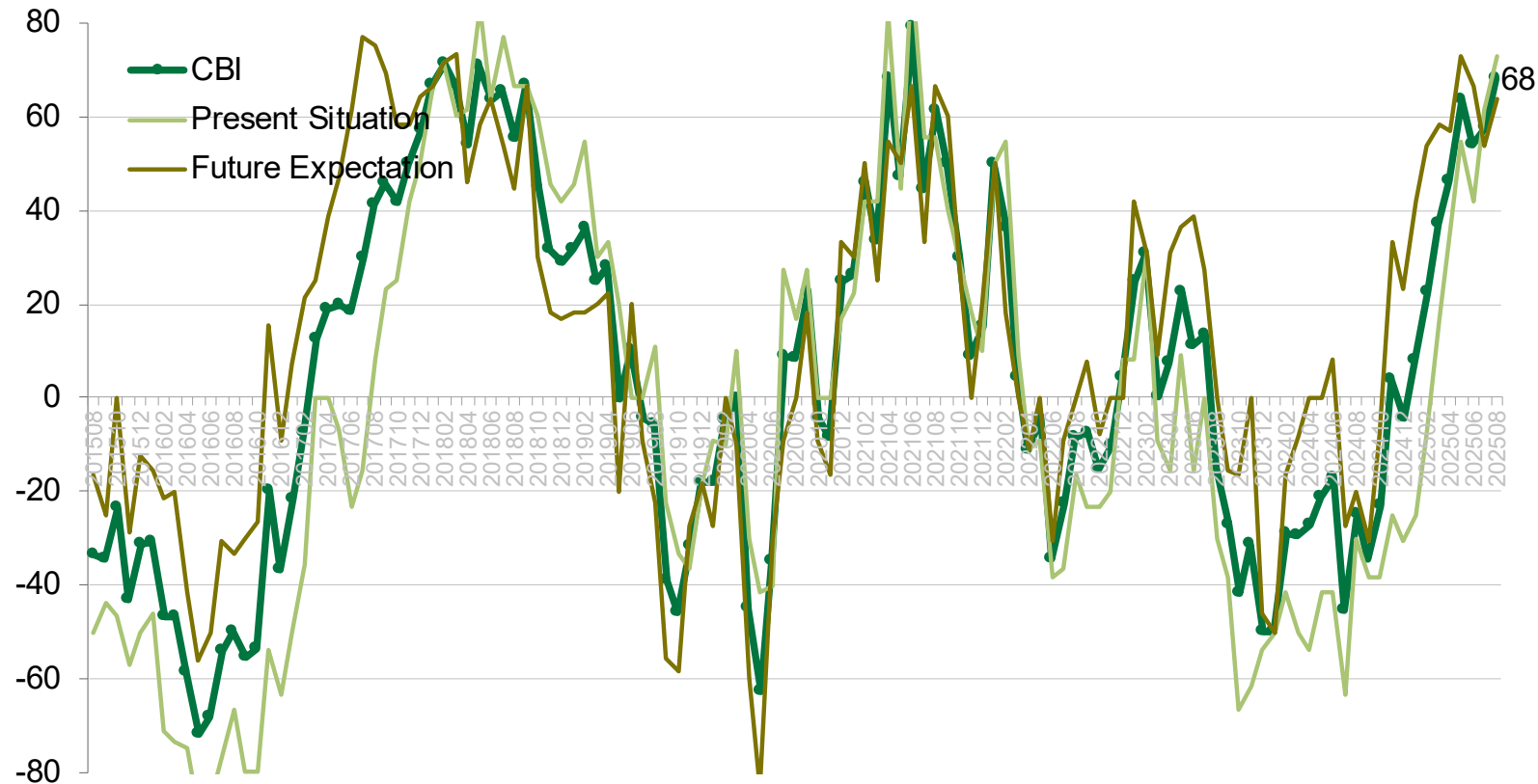


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Source: CEMA Business Barometer, August 2025

Business Climate

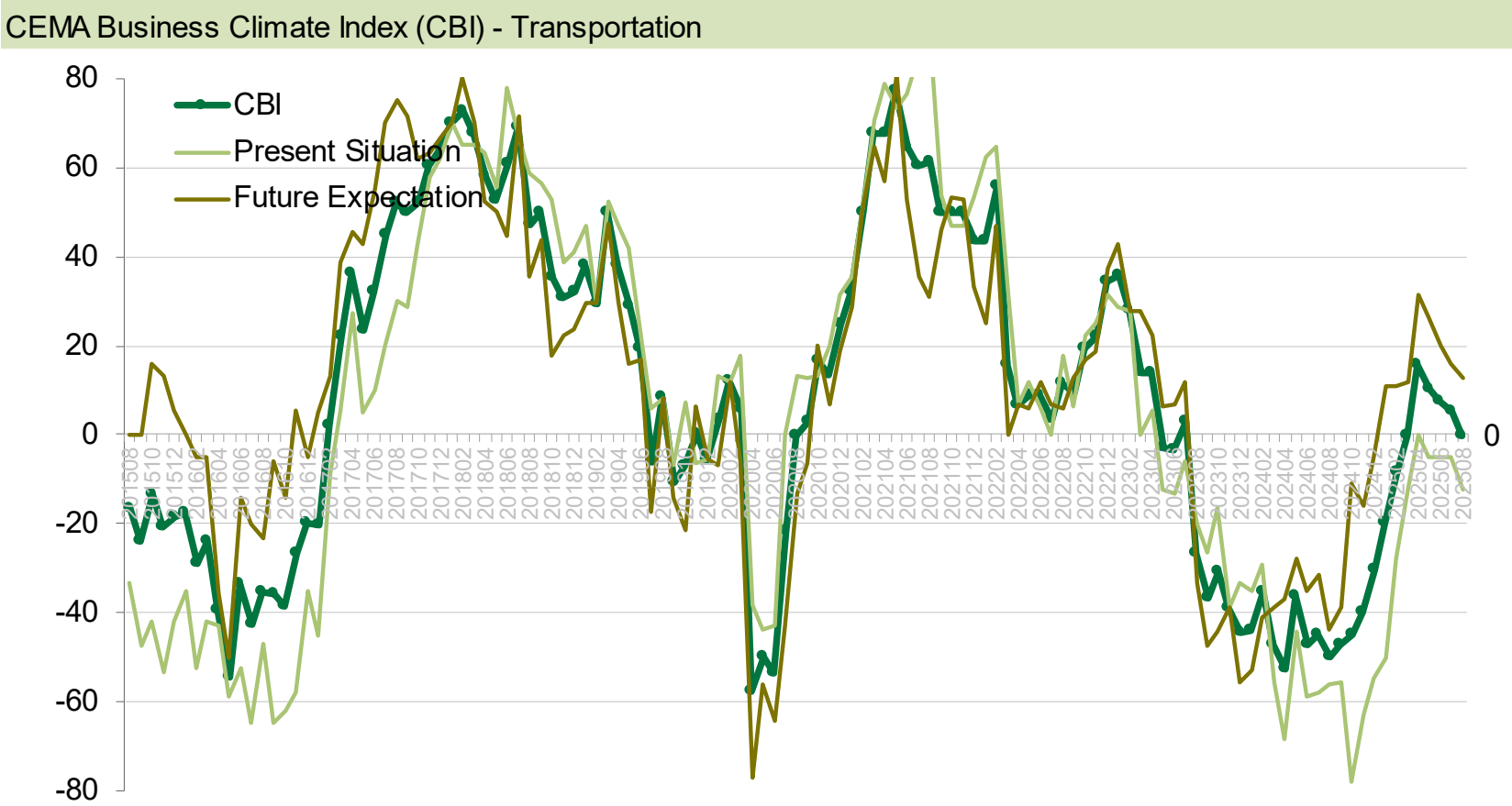
CEMA Business Climate Index (CBI) - Livestock Equipment



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Source: CEMA Business Barometer, August 2025

Business Climate

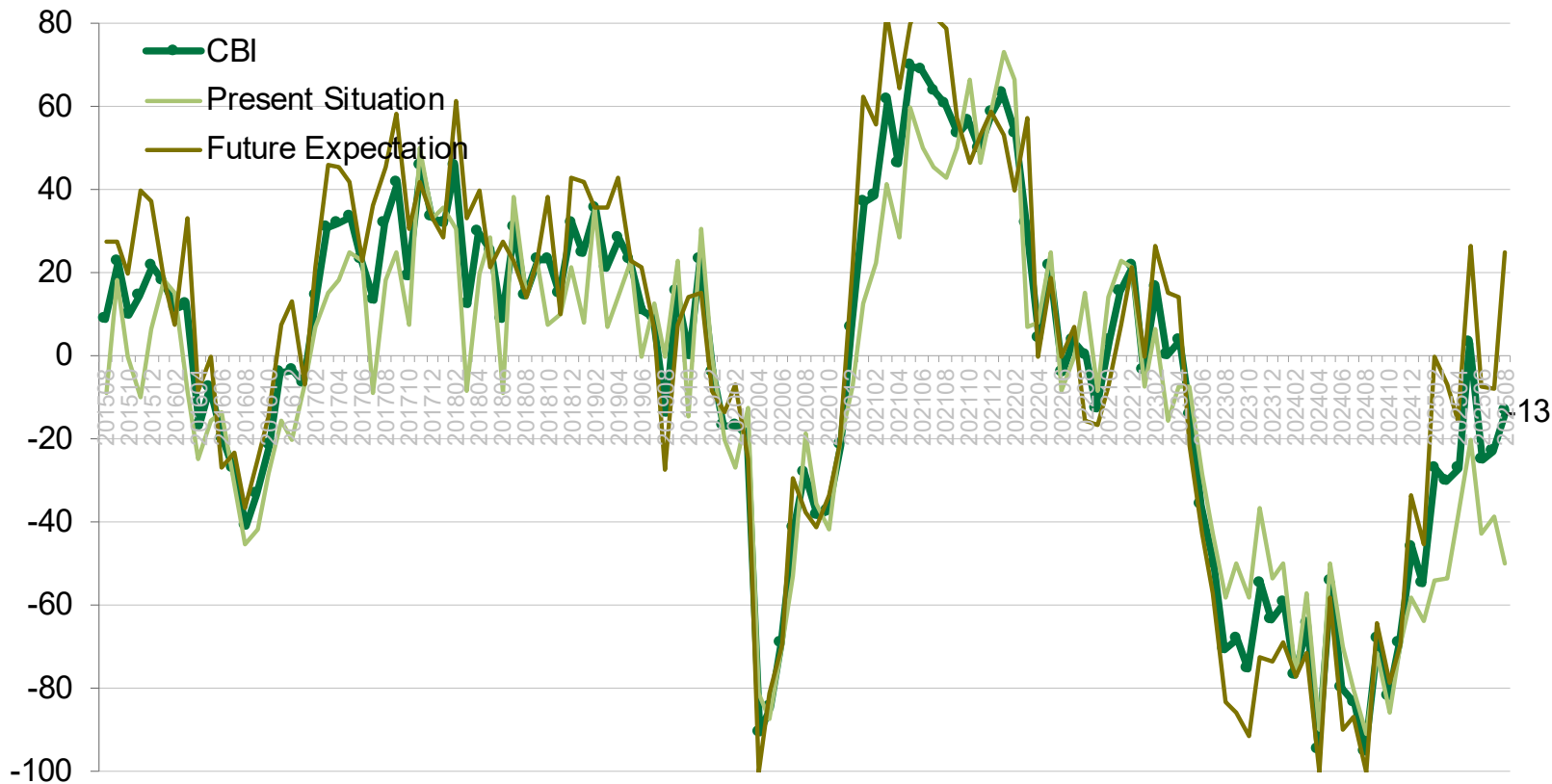


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Source: CEMA Business Barometer, August 2025

Business Climate

CEMA Business Climate Index (CBI) - Lawn, garden and Municipal equipment

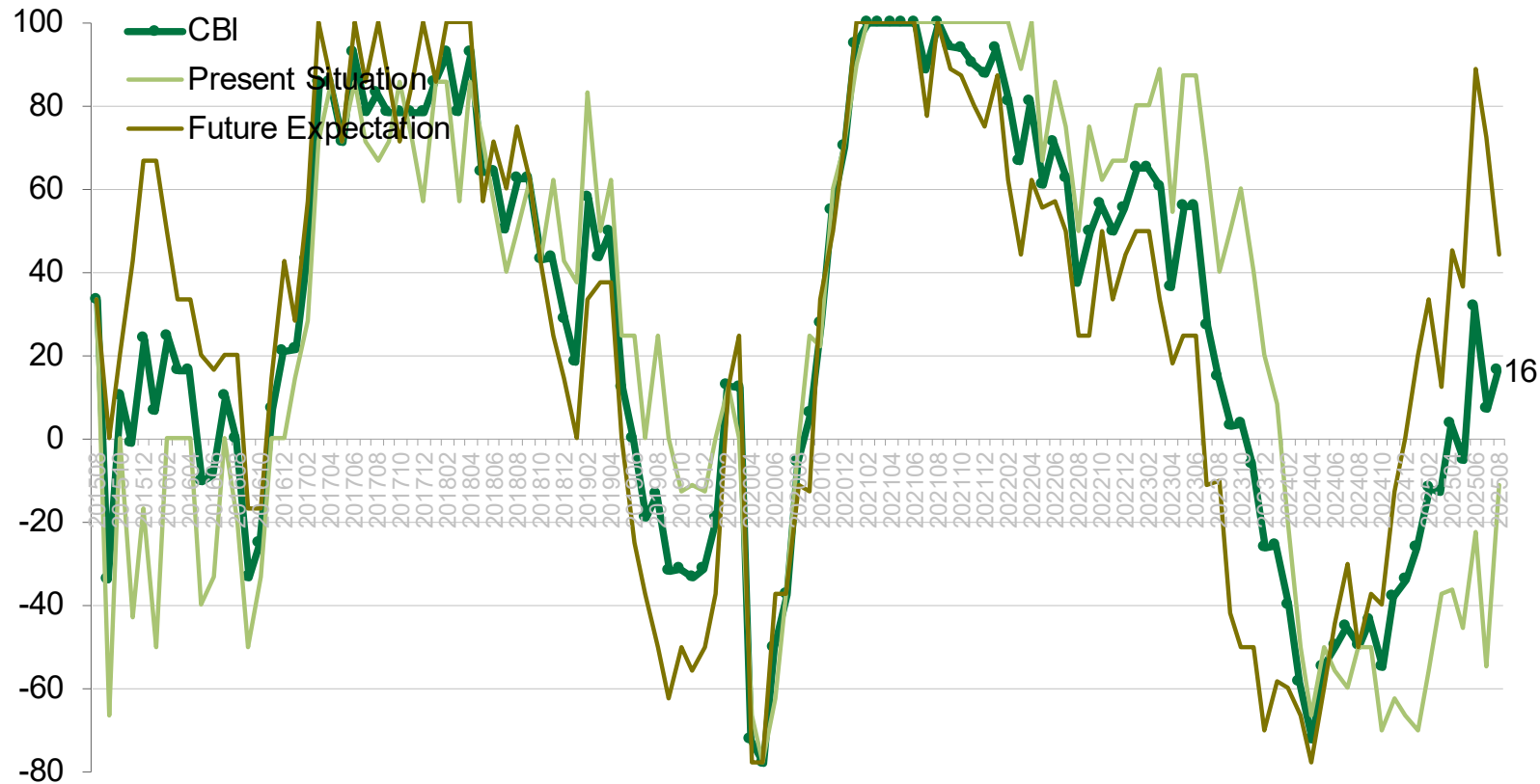


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Source: CEMA Business Barometer, August 2025

Business Climate

CEMA Business Climate Index (CBI) - Components

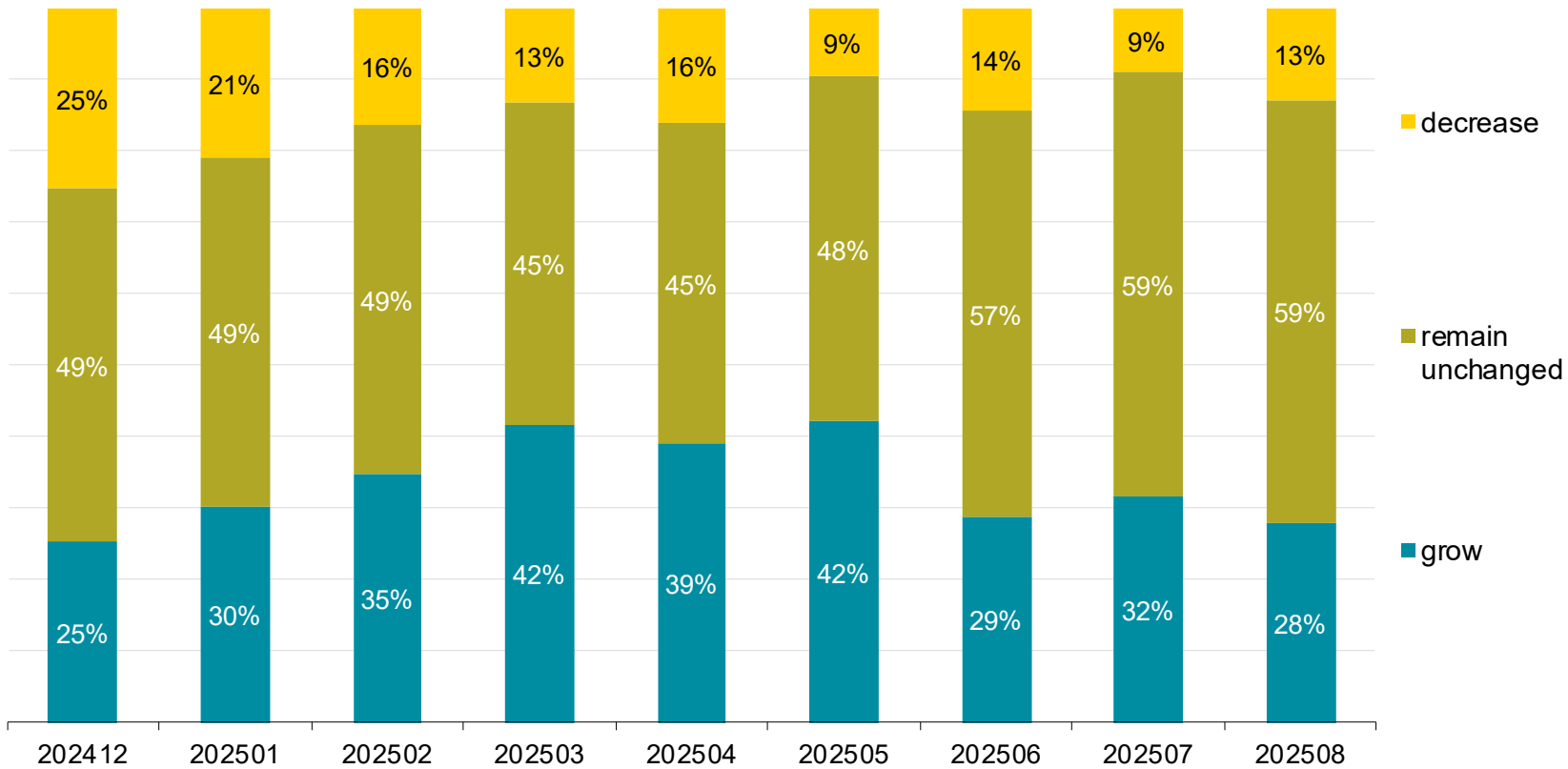


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Source: CEMA Business Barometer, August 2025

Business Climate

Question: We expect our overall **order intake** within the next 6 months to....



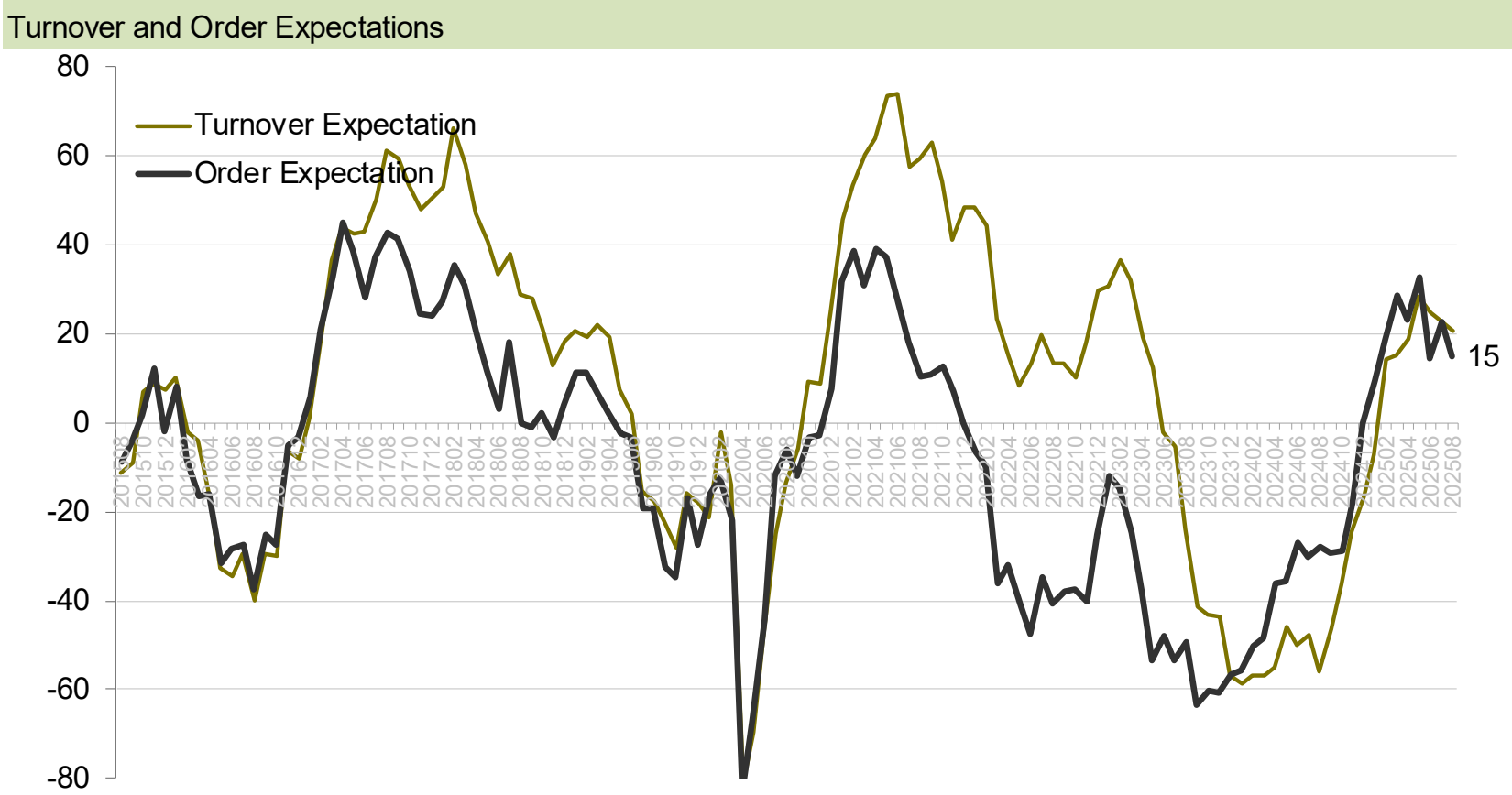
Source: CEMA Business Barometer, August 2025

Business Climate



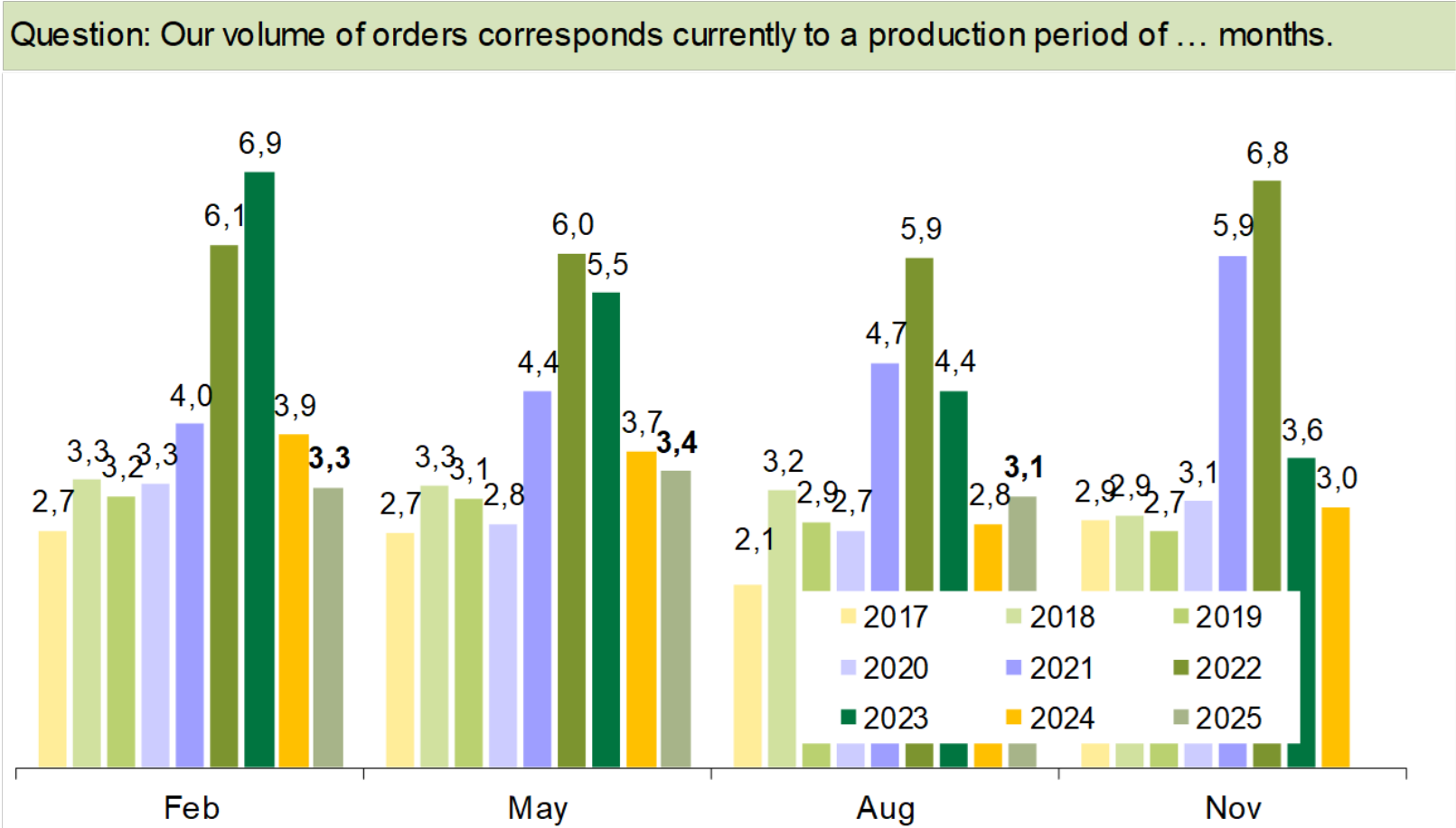
positive index = majority of respondents expects for the next six months an increasing order intake and vice versa (respectively compared to the previous year's level)

Business Climate



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Business Climate

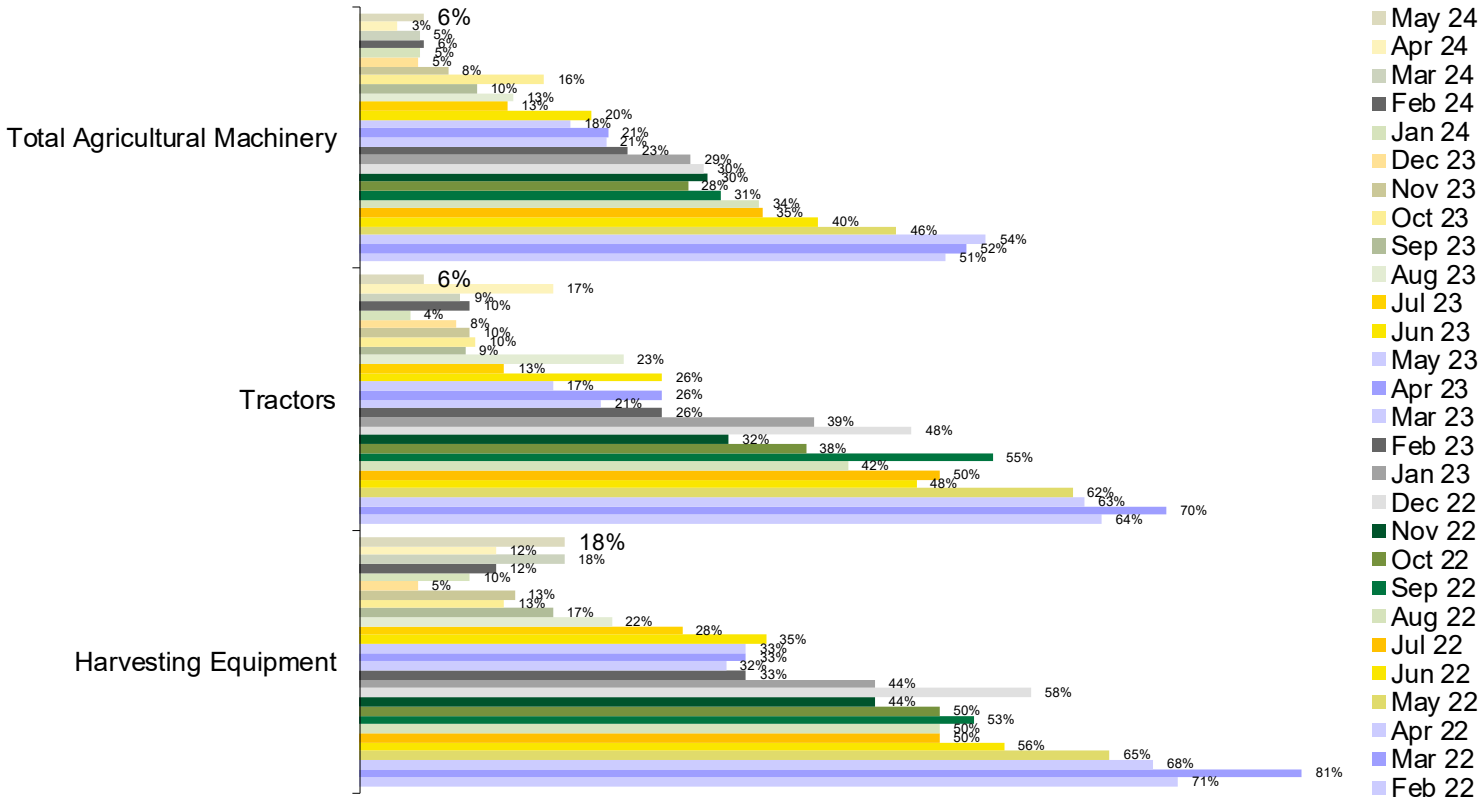


Source: CEMA Business Barometer, August 2025

Business Climate

Question: Do you expect production stops due to shortages on the supplier side in the coming four weeks?

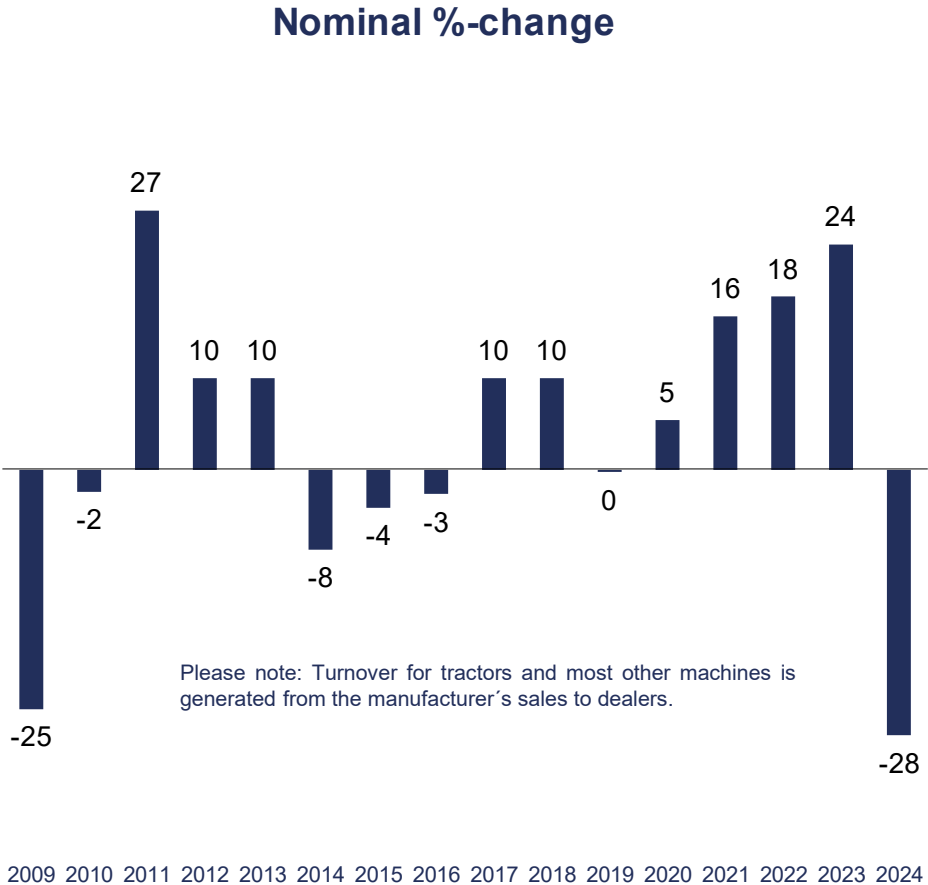
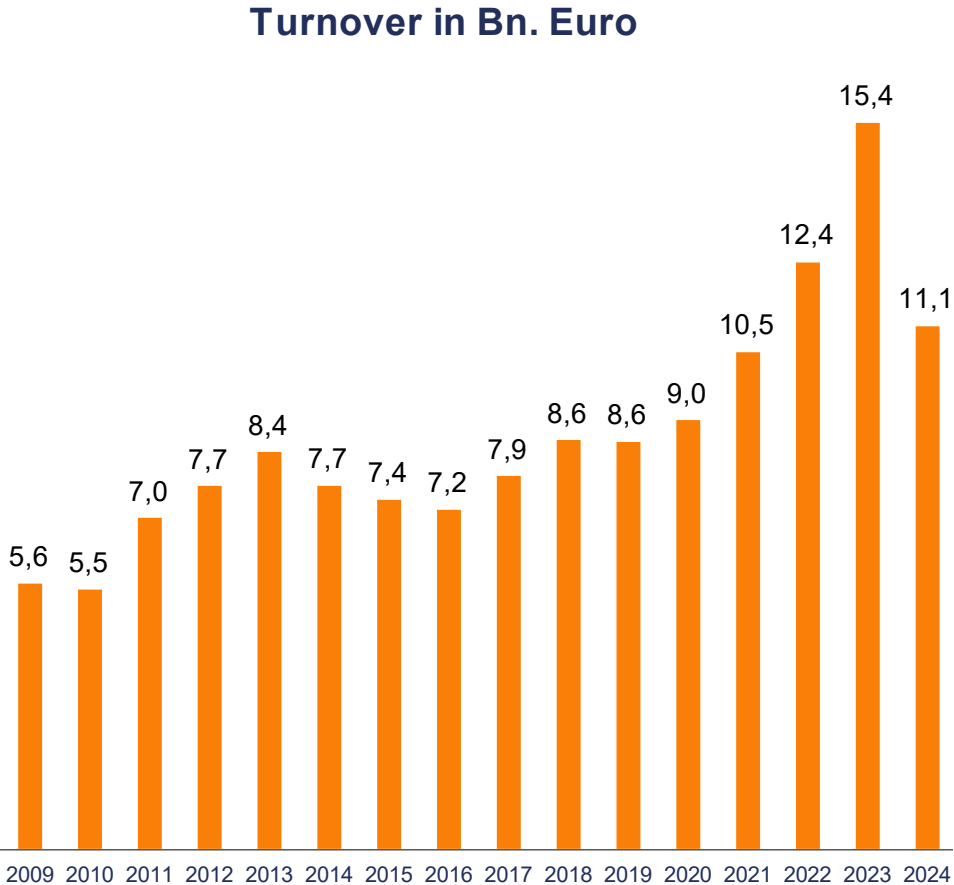
%-share of participants with the answer “Yes”



Source: CEMA Business Barometer, May 2024

03 Production in Germany

Turnover in the last years in Billion Euro



Source: VDMA Agricultural Machinery, March 2025

Turnover in the last years in Million Euro

Kind of machinery	Production				Exports			
	2022	2023	2024	Change	2022	2023	2024	Change
Tractors total	6.158,9	8.633,7	5.850,3	-32,2%	4.871,7	6.778,6	4.299,3	-36,6%
Soil working equipment	576,5	611,6	450,5	-26,3%	457,8	481,0	351,3	-27,0%
Implements for sowing, fertilizing, spraying	1.328,5	1.502,9	1.360,9	-9,4%	1.049,6	1.195,5	1.060,9	-11,3%
Harvesting machinery	3.055,9	3.461,0	2.349,4	-32,1%	2.460,5	2.796,7	1.834,5	-34,4%
Equipment for livestock production	220,5	288,0	286,4	-0,5%	128,3	185,9	189,2	1,8%
Conveying devices for agriculture	84,3	65,0	55,7	-14,4%	49,0	38,7	33,2	-14,3%
Trailers for agricultural purposes	104,4	93,3	93,3	0,0%	41,3	32,9	34,7	5,5%
Other agricultural machines including parts	881,5	698,2	618,6	-11,4%	507,6	465,0	373,7	-19,6%
Total	12.410,5	15.353,7	11.065,1	-27,9%	9.565,9	11.974,3	8.176,7	-31,7%

Listed single machines excluding turnover with parts

Source: VDMA Agricultural Machinery, March 2025

Turnover in the last **years** in **Million Euro**

	2021	2022	2023	2024	2024/23
Total Turnover					
Ag Machines	5.272,3	6.251,6	6.720,0	5.203,5	-22,6%
Tractors	5.234,9	6.158,9	8.633,7	5.850,3	-32,2%
Total	10.507,2	12.410,5	15.353,7	11.053,8	-28,0%
From Germany					
Ag Machines	1.263,0	1.557,4	1.524,2	1.335,8	-12,4%
Tractors	1.147,9	1.287,2	1.855,1	1.551,0	-16,4%
Total	2.411,0	2.844,6	3.379,3	2.886,8	-14,6%
From Export					
Ag Machines	4.009,3	4.694,2	5.195,7	3.867,7	-25,6%
Tractors	4.086,9	4.871,7	6.778,6	4.299,3	-36,6%
Total	8.096,2	9.565,9	11.974,3	8.167,0	-31,8%

Values in million Euro for the total calendar year

Source: VDMA Agricultural Machinery , August 2025

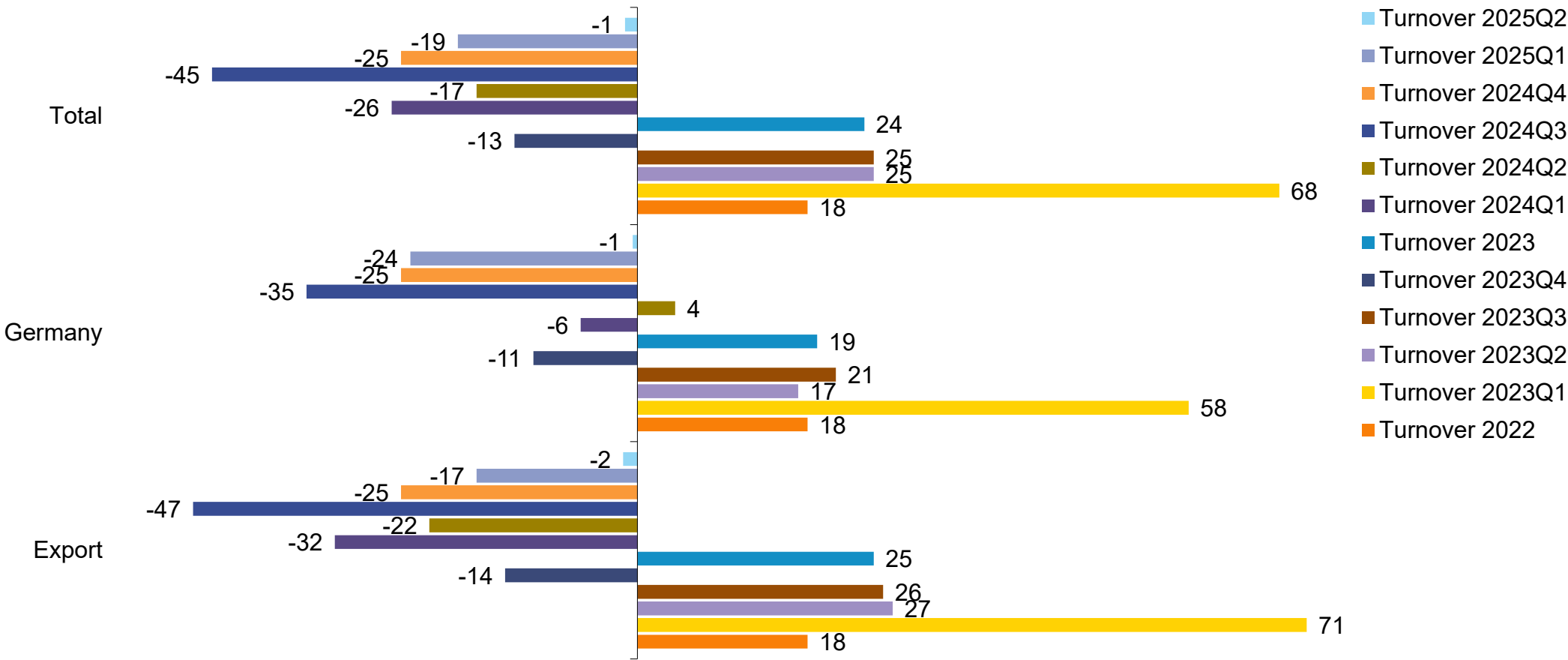
Turnover in the last H2 in Million Euro

	2022	2023	2024	2025	2025/24
Total Turnover					
Ag. machines	3241,9	4252,7	3346,3	3303,6	-1,6%
Tractors	2.720,9	4.375,9	3.387,0	2.763,0	-18,4%
Total	5.962,7	8.628,6	6.744,6	6.066,7	-10,1%
From Germany					
Ag. machines	802,8	953,9	903,1	845,2	-6,6%
Tractors	559,8	904,0	924,9	754,3	-18,4%
Total	1.362,6	1.857,9	1.829,5	1.599,5	-12,6%
From Export					
Ag. machines	2.439,1	3.298,8	2.443,2	2.458,5	+0,2%
Tractors	2.161,1	3.471,9	2.462,2	2.008,7	-18,4%
Total	4.600,2	6.770,7	4.915,1	4.467,2	-9,1%

Values in million Euro for the first half of each year

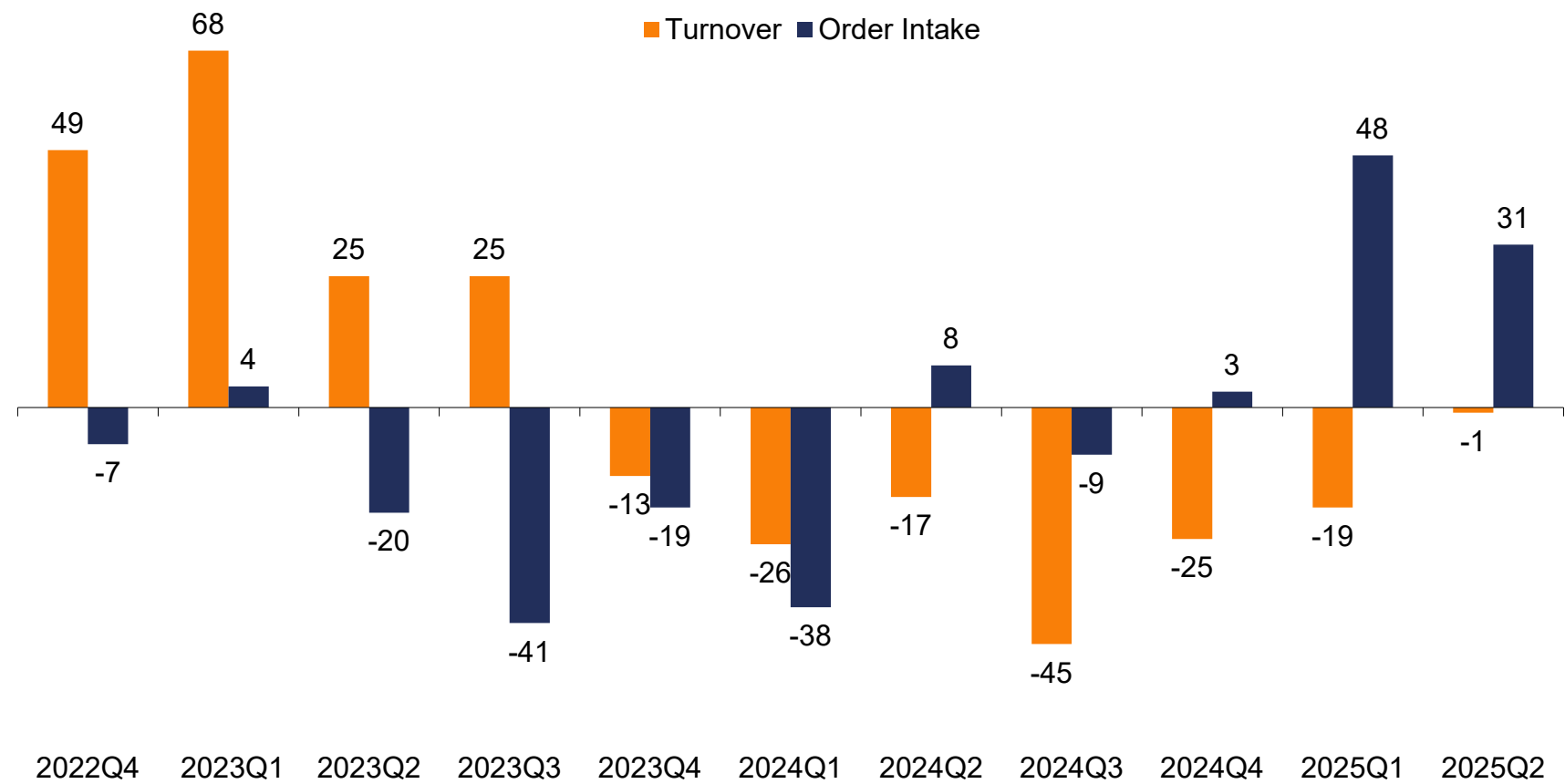
Source: VDMA Agricultural Machinery August 2025

Turnover in the last quarters in %



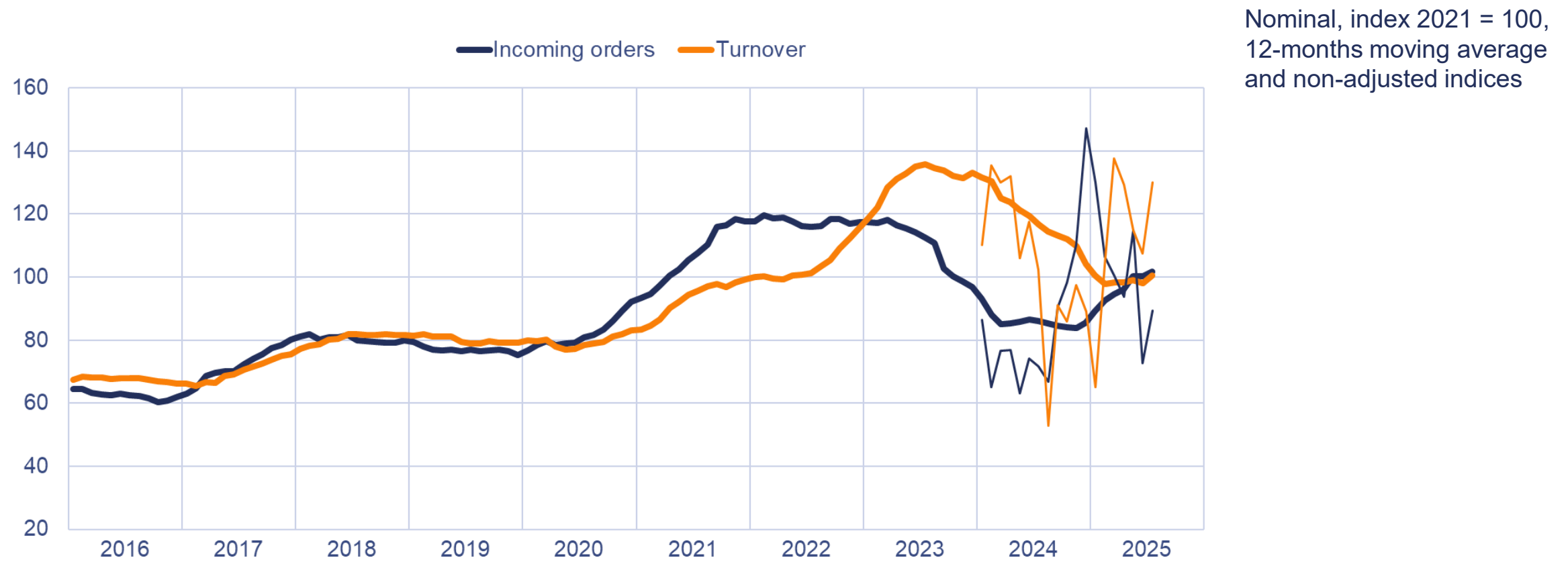
Source: VDMA Agricultural Machinery, August 2025

Turnover and Order Intake in the last quarters in %



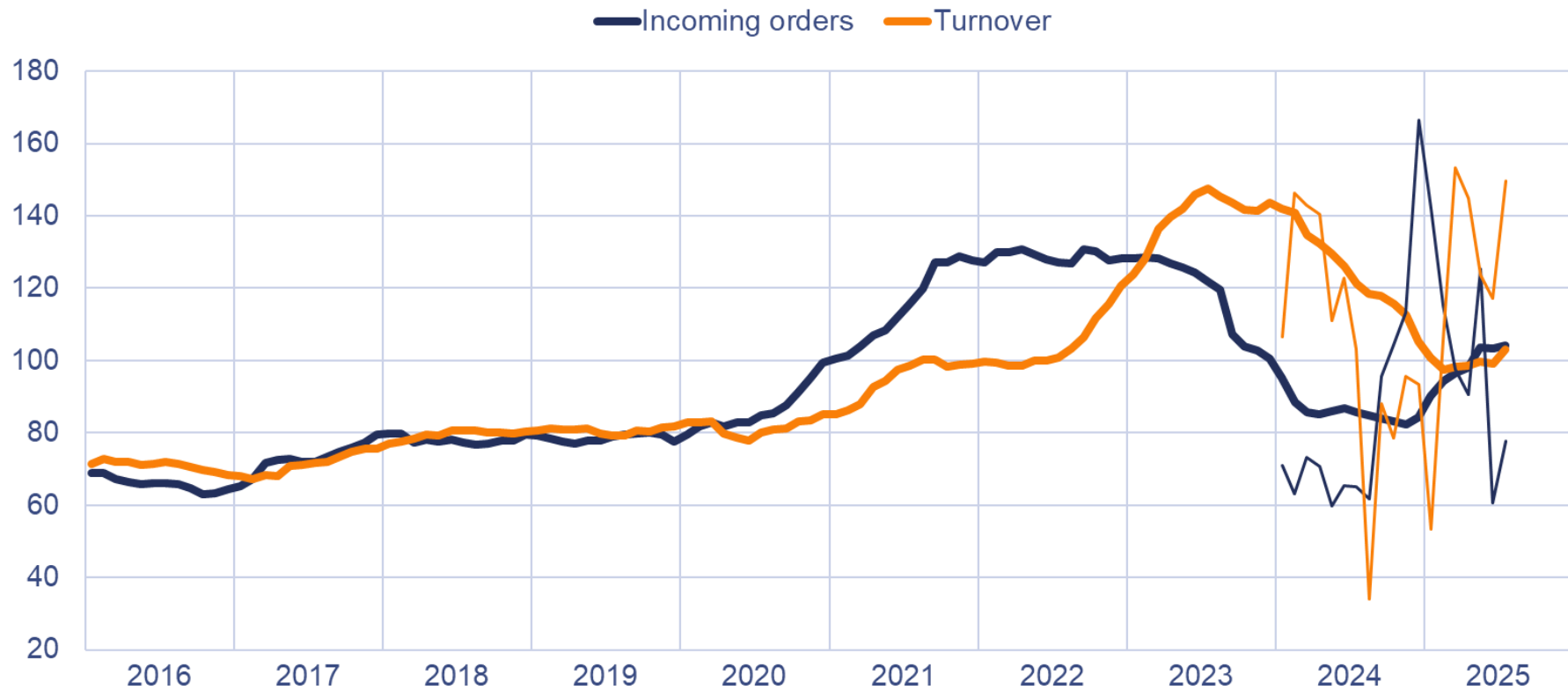
Source: VDMA Agricultural Machinery, August 2025

Turnover and Order Intake for Total AG Machinery



Source: VDMA Agricultural Machinery, August 2025

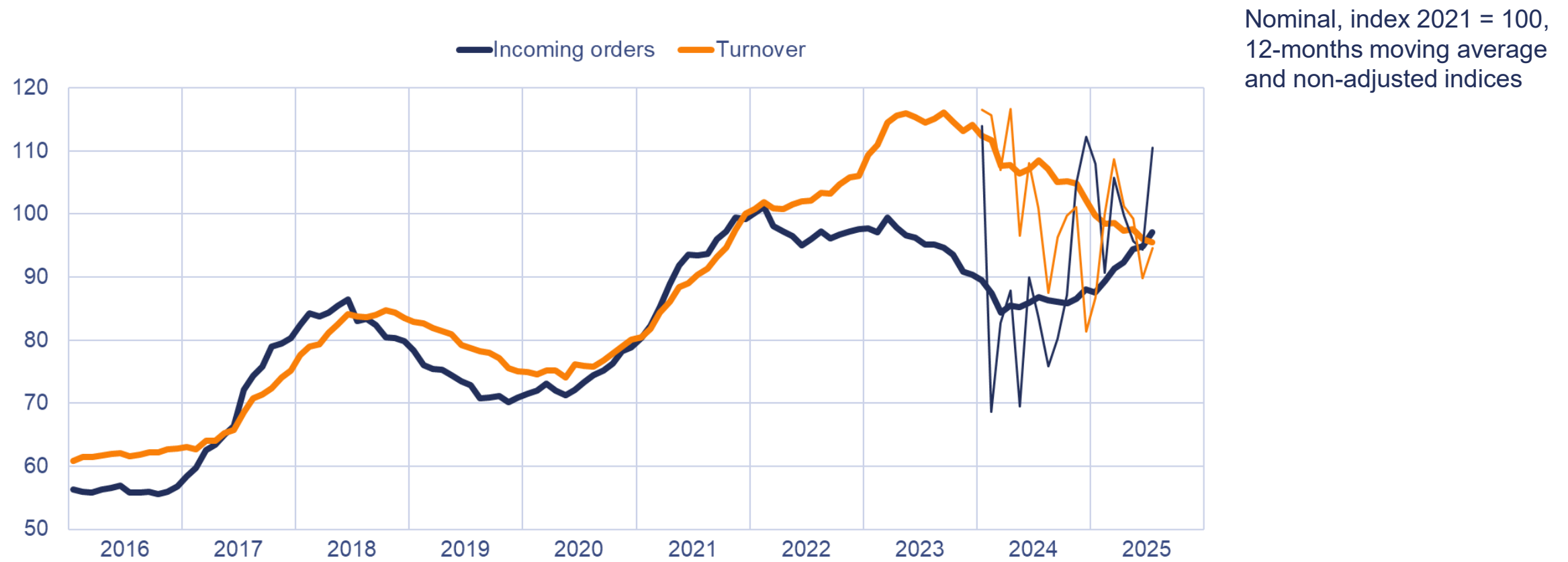
Turnover and Order Intake for Tractors, Harvesting & Arable Equipment



Nominal, index 2021 = 100,
12-months moving average
and non-adjusted indices

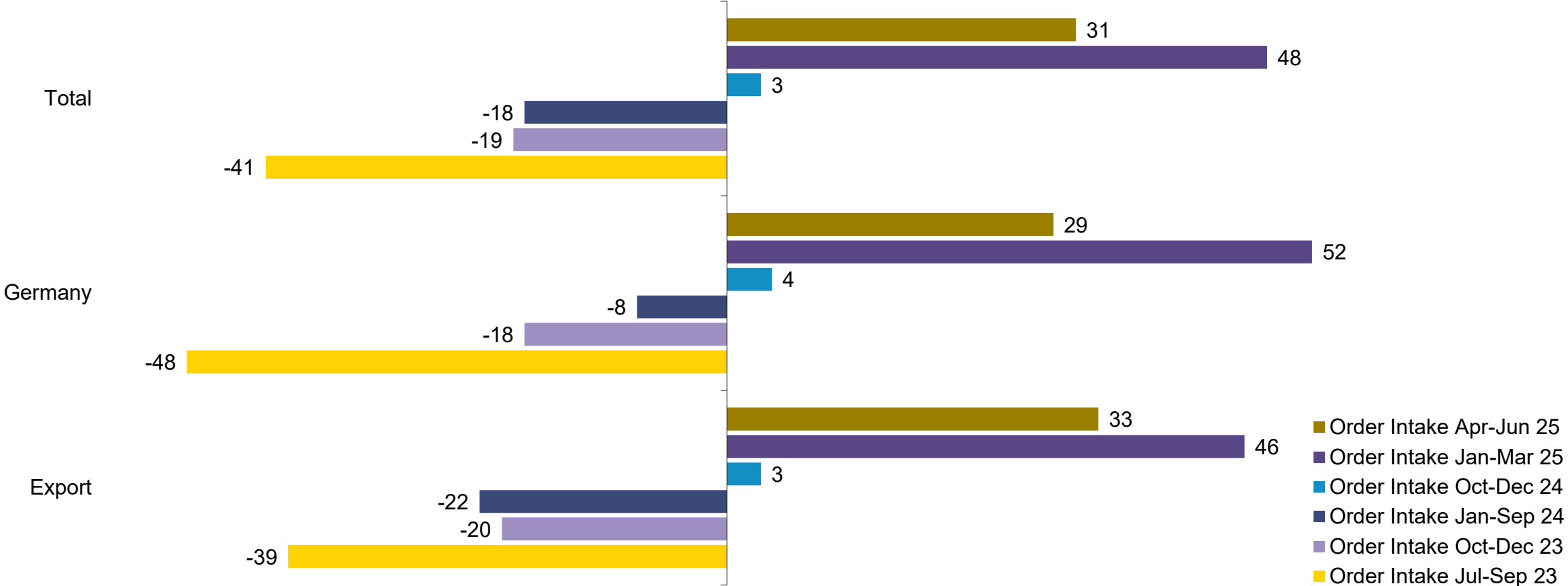
Source: VDMA Agricultural Machinery, August 2025

Turnover and Order Intake for Other AG Machinery



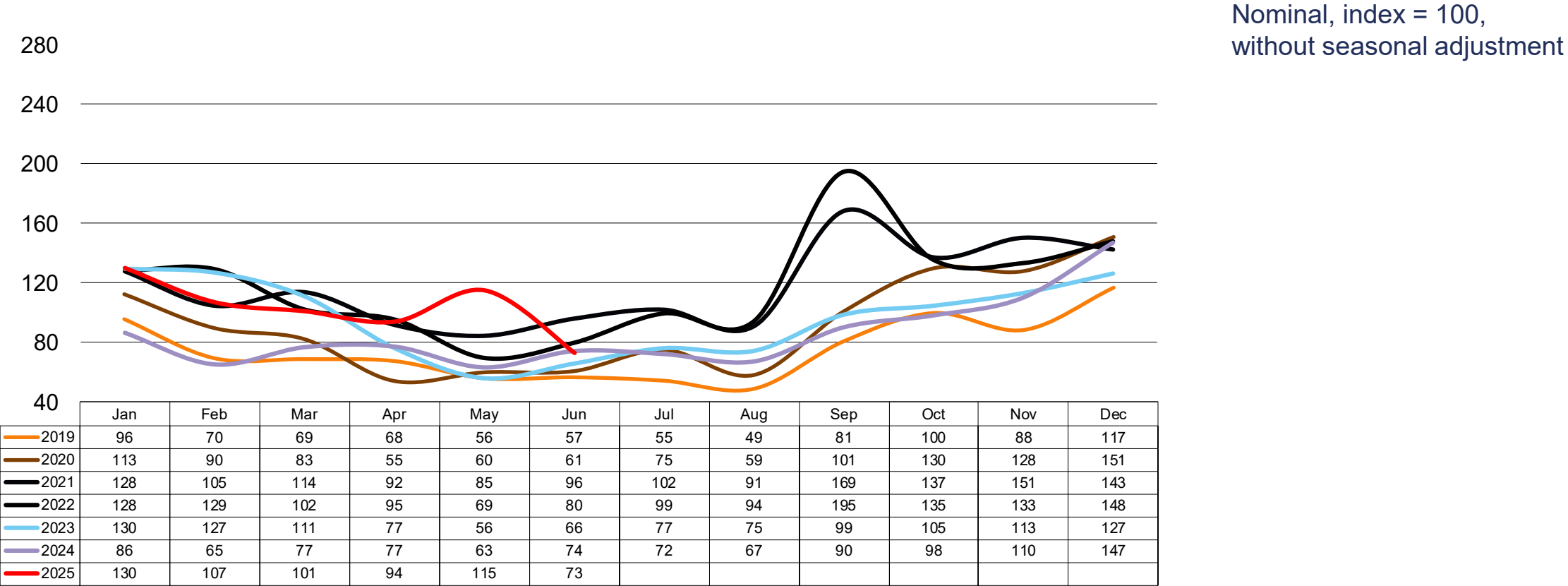
Source: VDMA Agricultural Machinery, August 2025

Order Intake in the last quarters in %



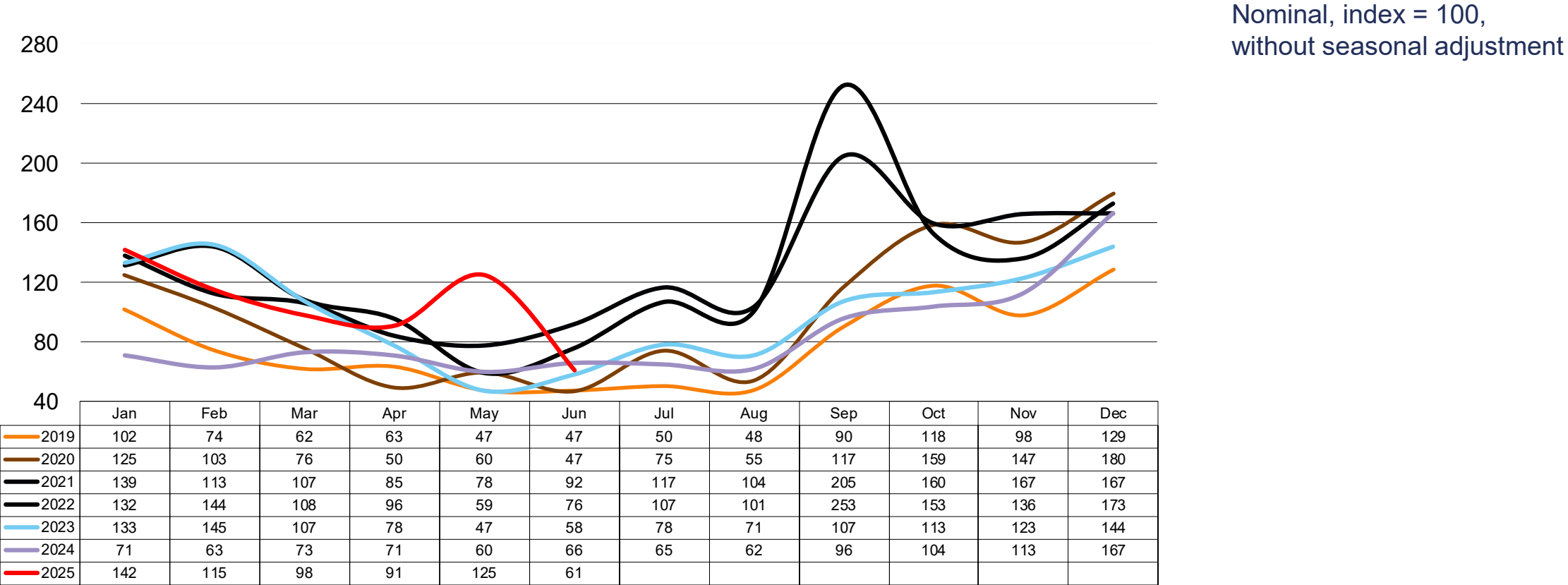
Source: VDMA Agricultural Machinery, August 2025

Order Intake for Total AG Machinery



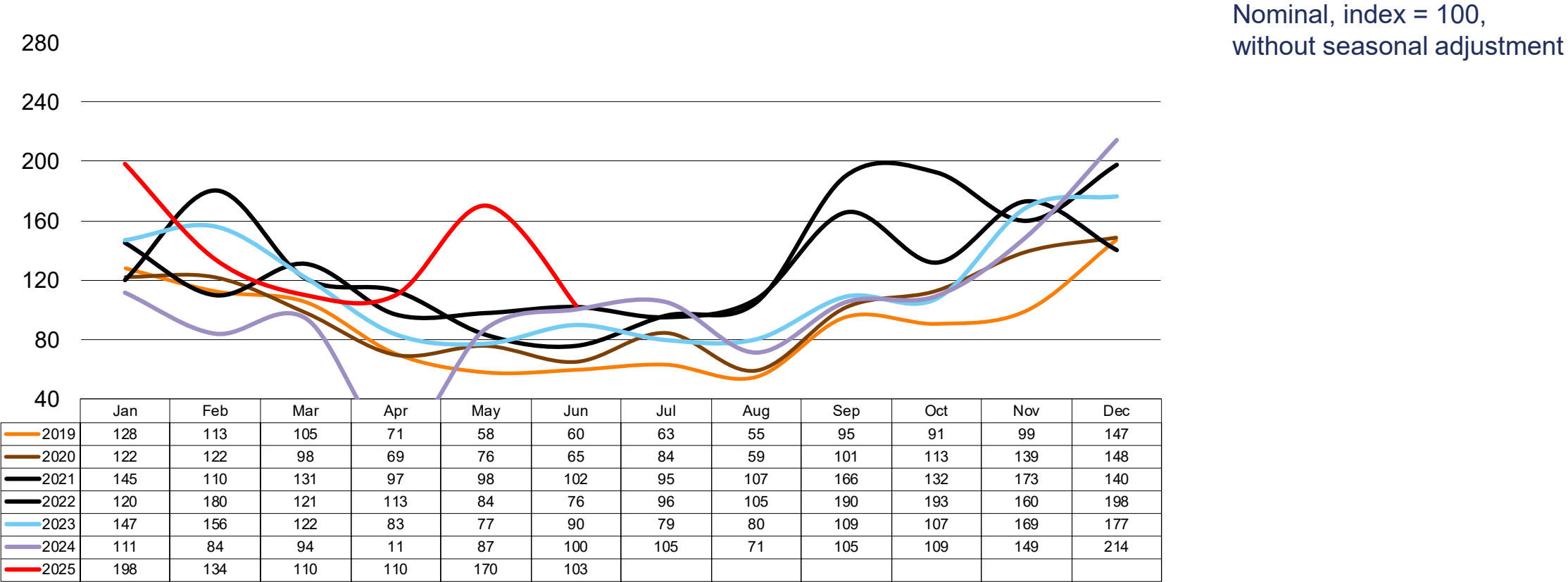
Source: VDMA Agricultural Machinery, August 2025

Order Intake for Tractors, Harvesting & Arable Equipment



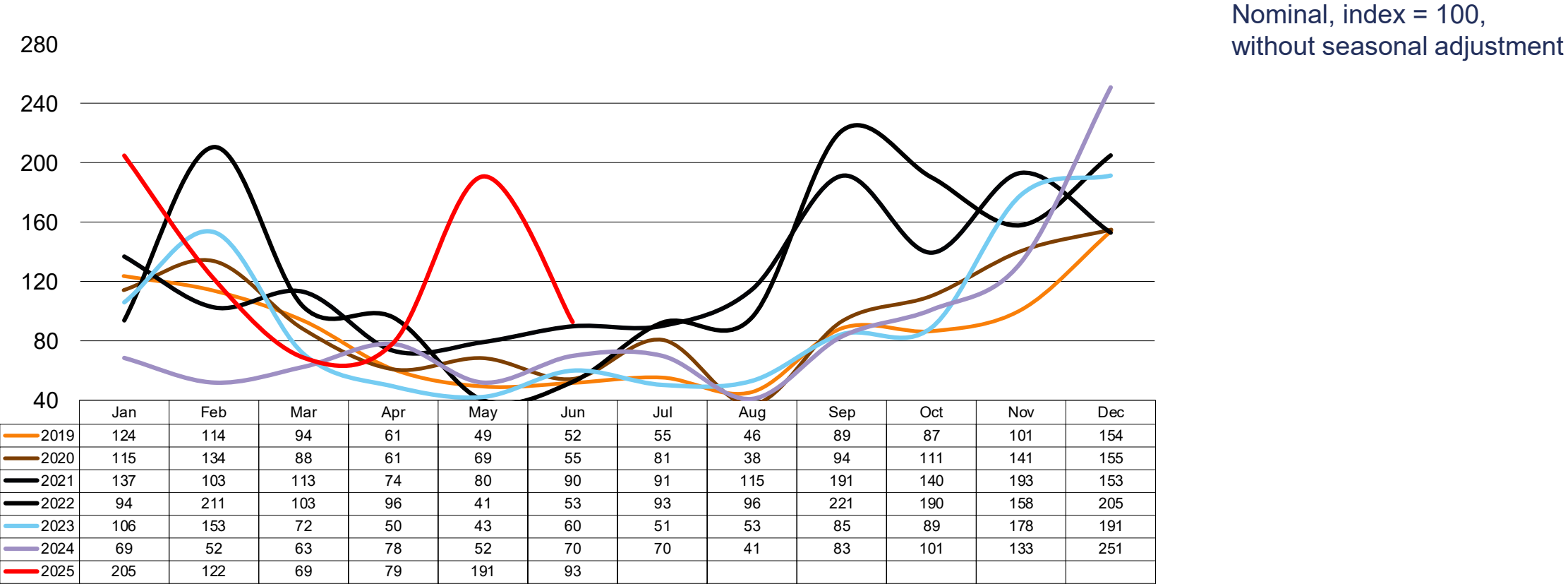
Source: VDMA Agricultural Machinery, August 2025

Order Intake for Total AG Machinery from the German Market



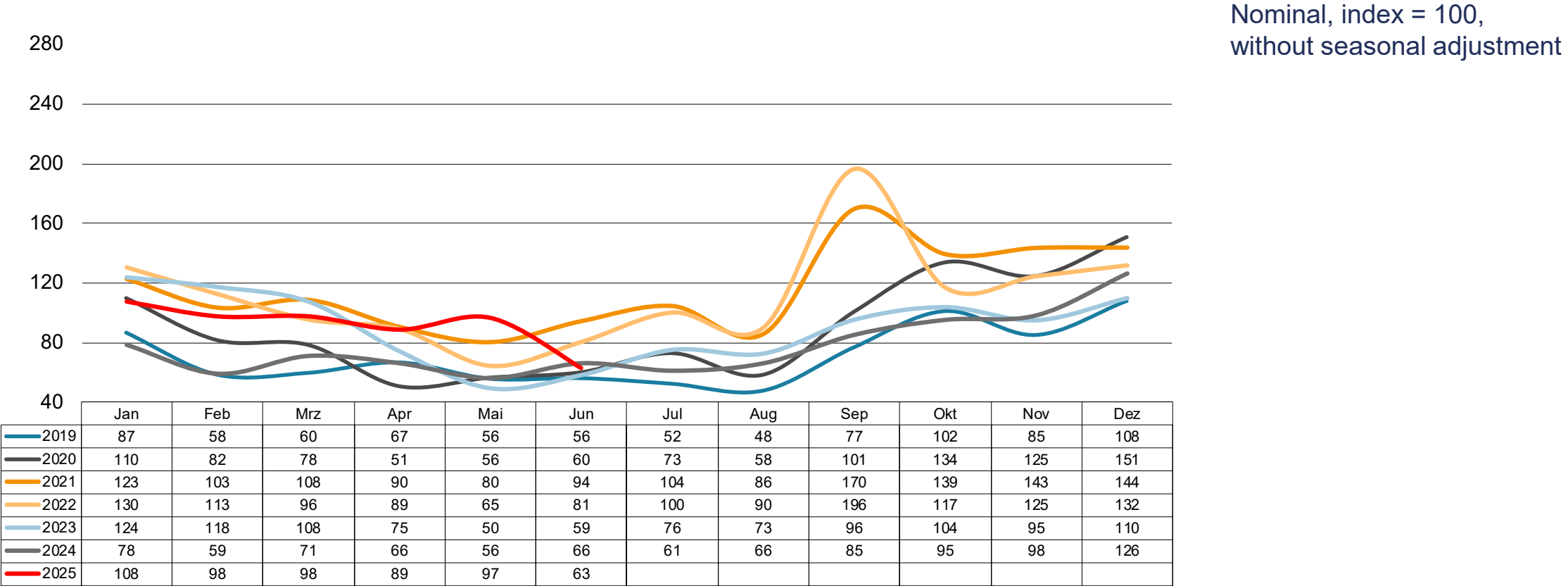
Source: VDMA Agricultural Machinery, August 2025

Order Intake for Tractors, Harvesting & Arable Equipment from the German Market



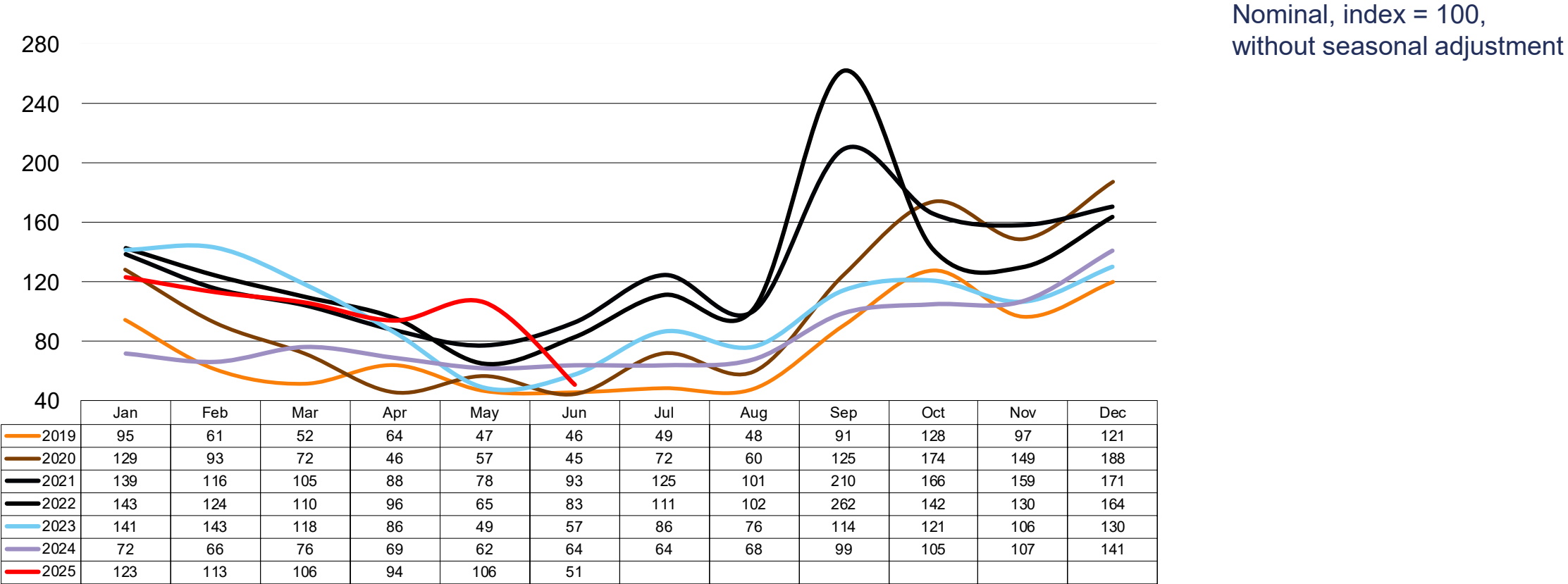
Source: VDMA Agricultural Machinery, August 2025

Order Intake for Total AG Machinery from Foreign Markets



Source: VDMA Agricultural Machinery, August 2025

Order Intake for Tractors, Harvesting & Arable Equipment from Foreign Markets



Source: VDMA Agricultural Machinery, August 2025

Your Contact

FOR FURTHER INFORMATION:

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We would like to draw your attention to the provisions of European and national competition law pursuant to which it is not allowed to discuss competition-related topics, such as prices or discounts, or to otherwise exchange sensitive company data in the course of association meetings. Forecasts of future business development are particularly critical in this instance, and can only be made in aggregated form through VDMA.

Furthermore, it is not permissible to agree on industry-related patterns of behaviour and/or pass resolutions and make arrangements in this respect. Doing so all the same, would be subject to severe fines that have to be paid by the association and its member companies. This is why these rules have to be adhered to without exception.

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