The market for agricultural and gardening equipment in Belgium

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FOREWORD

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Dear Reader,

This is the Economic Dossier of Fedagrim, the Belgian Federation for Agricultural, Horticultural, Livestock Breeding and Gardening equipment. In this Dossier, we present an economic Balance Sheet of the past year. We place the figures relating to Fedagrim members in a broader context, pointing out certain opportunities, while at the same time focusing attention on some threats. The Dossier offers a guide and barometer for the mechanisation sector in particular, and the agricultural, livestock, gardening and green zones sectors in general.

While Fedagrim does not wish to draw any comprehensive conclusions based on the last year, it does have the intention and mission to closely monitor and guide the sector in order to make innovation possible and to leave its mark on an important sector. General trends show that the food supply and the related mechanisation have interesting challenges ahead. Taking into account a growing world population and the reduction in the land under cultivation, agriculture will have to significantly increase production levels. Mechanisation and new technologies are important factors in this context.

The past year shows that 2011 was favourable to the mechanisation industry. It remains to be seen whether this trend will continue. This aspect will be the subject of a separate Dossier. The industry itself still appears hopeful, but the broad context in which the economy has to manoeuvre today is by no means a rosy one. Yet let us not be tempted to indulge in defeatism, but let us remain positive – just like the figures! Every crisis is a challenge. That may sound like a witticism, but like every witticism, it does contain a grain of truth. And it is this truth that this report is concerned with.

Jan Packo
Chairman of Fedagrim

INTRODUCTION

2011 has been a good year for agricultural mechanisation

The Belgian mechanisation sector can look back at the year 2011 with some satisfaction, with general rise in sales. The situation is somewhat different in the pig breeding business. Investments by pig farmers still remain exceptionally low. And there is every indication that this situation will not change, at least in the near future. The fruit and vegetables sector seems to be recovering slowly – especially after the EHEC-bacteria debacle. The real euphoria is amongst the crop farmers. Spectacular potato and cereal prices have triggered a positive mood, resulting in additional investment in mechanisation within the sector.

Thanks to the growth in the land area under potato cultivation – barring a small decline in 2011 – crop farmers have invested in larger and more sophisticated machines. In 2011, the number of tractors rose by about 15% (reference date October 2011). This figure, combined with the constantly rising average horsepower of the equipment, the increasingly more comprehensive accessories installed in the tractors, and standard purchase price increases, leads us to conclude that tractor sales shall increase by over 25% in 2011 in comparison to 2010. This means that 2011 will more than compensate for the rather less favourable year 2010. Keeping in mind that tractor sales make up around 40 to 50% of the total agricultural mechanisation sales, there is a strong basis to make cautiously positive projections for the entire sector for 2011. This is supported among other things by an increase in the number of combine harvesters, balers, ploughs and sprayers. However, 2011 began under an evil star with a sharp drop (50%) in the number of self-propelled forage harvesters. This was because of the extreme harvesting conditions in autumn 2010. Due to trade issues, the sales of new forage harvesters remained low.

We noted a slight increase in sales this year as well, in the gardening and green space sector. The warm spring season has had a positive impact on sales. On the other hand, the wet summer has dampened enthusiasm. Sales have stagnated and the growth that was initially projected has largely evaporated.

The dairy industry is also content. Again, more traditional milking sheds and compound feed vehicles were sold. Milk prices rose by 14% in comparison to 2010 during the first eight months of 2011, leading to greater willingness amongst dairy farmers to make investments.

General climate of the agricultural sector in Belgium

The agricultural mechanisation sector has reason to be satisfied with 2011, but is now faced with a worrying trend. The number of agricultural and horticultural businesses has fallen by 6.9% in 2011 and currently stands at 39,904. The area under cultivation fell by 1.5%, in spite of 2,404 hectares of wasteland having been brought under cultivation. The area under cultivation was over 1,337,000 ha. in 2011. In contrast to these negative results, the average farm size is increasing hand over fist. There is also the fact that the world population continues to grow steadily. The Food and Agriculture Organisation of the United Nations has estimated that food production will have to increase by 70%, if we are to continue to be able to feed the world. By 2050, the world population will be nine billion people.

For the time being, Fedagrim does not anticipate any adverse impact of the European debt crisis on the positive mood prevailing in the agricultural mechanisation sector. The mood of even foreign suppliers – who by far make up the bulk of the mechanisation sector in Belgium – continues to remain positive. This can be seen from the economic barometer, in which 130 European manufacturers participated.

This is the general climate within which the members of Fedagrim, consisting of 33 manufacturers and 47 importers, operate. The opportunities are there for the taking, but the threats are equally present. And it will be necessary to keep the finger on the pulse in the future, and to make adjustments wherever necessary to convert these challenges into opportunities.

Evolution of the number of farms

The number of enterprises in agriculture and horticulture in Belgium is decreasing each year. This number has halved over 20 years. Currently, 39,904 agricultural and horticultural businesses are still active in Belgium. This drop has occurred in both Flanders and Wallonia. It is also a fact that the size of the average farm is increasing. In Wallonia, farms are larger than those in Flanders. The actual number of persons employed in primary agriculture has fallen by about 33%.

The total land area under cultivation is also falling, though less dramatically than the number of farms. The land area fell by 4.1% to 1,337 million hectares over a period of eleven years. In division based on crops, there is a change in the classification and in the number of effective hectares under cultivation. The last ten years saw the sharpest increase - of 75% or 27,000 hectares - in the number of hectares under grain maize cultivation. The land area under grain and potato cultivation has also grown significantly in ten years, but this seems to be tapering off starting from 2011, in which a drop was seen for the first time. Although many trends apply to both Flanders and Wallonia, there are still discrepancies between the two regions, particularly for cereals. Wallonia seems better represented here.

Potatoes and sugar beets

Belgium is a potato country. Cultivation has increased by 24% over the last ten years. In 2010, the land area under potato cultivation was 81,760 hectares, which is 16,000 hectares more than in 2000. Potatoes are the fourth crop in Belgium, after winter cereal, silage corn and grain maize. Over 2.5 million tons of potatoes were harvested in 2010. Of this, 60% goes to the chips industry. The Belgian potato-processing industry is the fastest growing sector worldwide. In Flanders, approximately 45% of the potato crop is purchased by the trade and the processing industry.

A change seems to be in store for the sugar beet sector. The cultivation of beets has risen again, for the first time after 10 years. The price pattern has also taken a positive turn. The gradual decline over the last ten years - both in volume as well as price - seems to be a thing of the past.

The Annual Report of the Belgian Confederation of the Dairy Industry (BCZ) shows that 3.2 billion kg of milk was produced in 2010. Production is therefore rising slowly but surely. In 2009, this was 3.1 billion kg. This was produced from 564,000 dairy cows. The distribution between Flanders and Wallonia is 285,000 and 279,000 respectively, keeping in mind that Wallonia has more than 60% of the grazing area. Belgium has 9,532 milk suppliers, with Flanders having 58%, and Wallonia 42%. The provinces of Antwerp, Limburg and Liège are the three largest milk producers.

Fedagrim Members

In 2011, Fedagrim represents exactly 80 companies, namely 33 manufacturers and 47 importers. This is a slight drop in comparison to 2010, when Fedagrim had 87 members. The decrease can be ascribed to acquisitions, relocations and/or complete loss of agencies. Fedagrim welcomed several new members during the same period. Seven of the 80 members are importers as well as manufacturers. They not only offer their own products on the Belgian market, but imported brands as well. The 33 manufacturers are also export-oriented, two of them belong to a multinational group. In fact, a significant proportion of all members of Fedagrim belong to a multinational group. Specifically, 24 members - or more than 25% of all the members - either are a multinational organisation or belong to one.

MEMBERS	ORIGIN
BouMatic, TORO[1], Mueller Sales[1]	United States of America
Hitachi, Makita, Honda	Japan
Stihl, Lemken, GEA[1]	Germany
Etesia, Manitou[1]	France
Husqvarna[1], DeLaval	Sweden
JCB	Great Britain
Kverneland Group[1]	Norway
GGP	Sweden/Italy
CNH* (2 bedrijfseenheden)	USA/Italy
Lely Packo, Jean Heybroek (Reesink Groep) Matermaco, Matera, Mechatrac (Mechangroep)	The Netherlands

[1]: listed multinational

Fedagrim's 47 importers plus the seven mixed enterprises (manufacturers-cum-importers) represent more than 100 foreign brands from the major Western European countries, the United States, and Japan.

Fedagrim members can be divided into 4 sectoral sub-groups, constituted as follows:

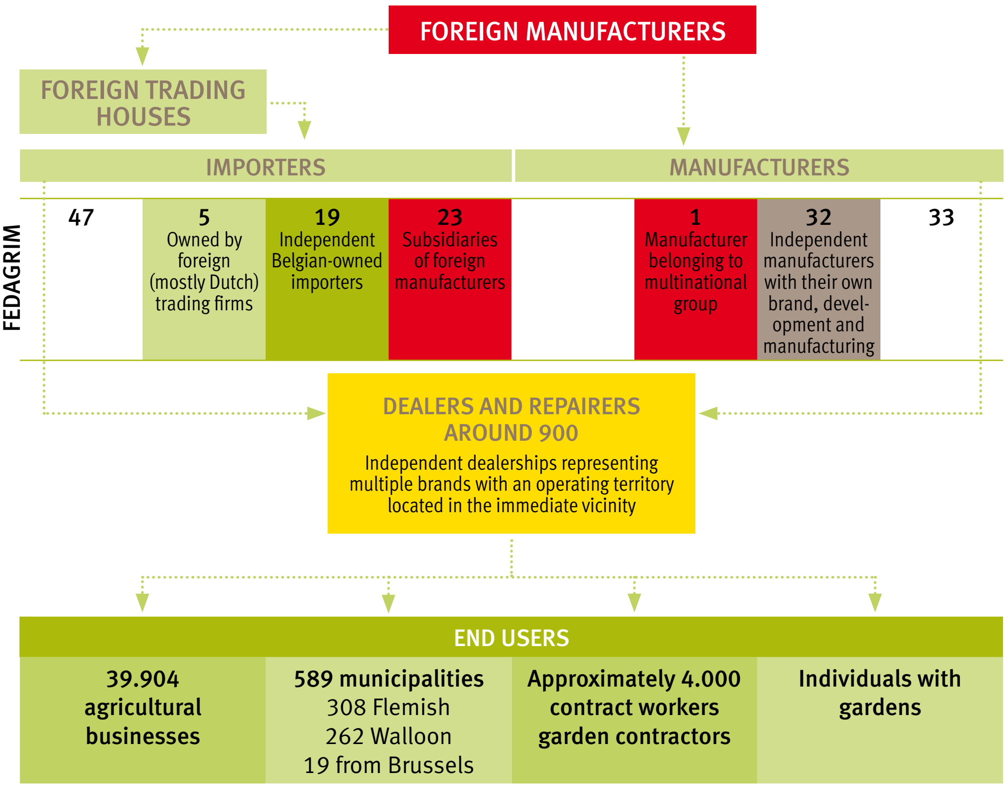
		NUMBER OF MEMBERS
GROUP 1	Tractors	15
GROUP 2	Farming equipment	34
GROUP 3	Equipment for sheds and milking equipment	23
GROUP 4	Gardens and green spaces	31

17 members are affiliated to several sectoral subgroups.
In addition, 17 of the 80 Fedagrim members are affiliated to Agoria, and 43 to Agrimadis.

	Tractors	Farming equipment	Sheds and milking equipment	Gardens and green spaces
Total	15	34	23	31
Importers	13	23	10	23
Manufacturers	2	11	13	8

DISTRIBUTION CHAIN

Distribution chain in Belgium



Audit of the Belgian market for tractors

At the end of October, the National Institute of Statistics published the figures for tractor sales in Belgium, and these figures show that more than 2,275 units were registered during the first 10 months. This represents an increase of 15.4% in comparison to the same period in 2010. This figure means that the performance in 2011 was significantly better than in the years 2009 and 2010, at which time, 2,197 and 2,177 tractors, respectively, were sold during the entire year. The first ten months of 2011 were therefore much better. The record for 2008 – in which 3,178 tractors were registered - will not be broken this year.

Market shares by Make

NO.	MAKE	JAN-OCT 2011		JAN-OCT 2010		JAN-DEC 2010	
		NUMBER	SHARE	NUMBER	SHARE	NUMBER	SHARE
1	New Holland	570	25.1	545	27.7	594	27.3
2	John Deere	529	23.3	390	19.8	436	20.0
3	Fendt	250	11.0	215	10.9	246	11.3
4	Case IH	192	8.4	186	9.4	206	9.5
5	Deutz-Fahr	180	7.9	185	9.4	203	9.3
6	Massey Ferguson	159	7.0	125	6.3	133	6.1
7	Claas	105	4.6	84	4.3	92	4.2
8	JCB	92	4.0	60	3.0	65	3.0
9	Valtra	55	2.4	42	2.1	49	2.2
10	Steyr	48	2.1	41	2.1	45	2.1
11	Landini	25	1.1	17	0.9	19	0.9
12	McCormick	22	1.0	26	1.3	29	1.3
13	Lamborghini	19	0.8	27	1.4	31	1.4
14	Same	12	0.5	9	0.5	9	0.4
15	Zetor	10	0.4	13	0.7	14	0.6
16	Lindner	7	0.3	5	0.3	5	0.2
17	Belarus	0	0.0	1	0.0	1	0.0
	TOTAL	2,275	100	1,971	100	2,177	100

An important finding is that tractors of increasingly higher horsepower are being registered. Moreover, the tractors are also more ‘complete’ than ever before, and are equipped with GPS, air conditioning, Isobus, comfort accessories and lots of electronics devices. This not only makes the tractors more sophisticated but also more expensive. Tractor sales are expected to rise by 25% in 2011, due to the almost 16% increase in sales compared to 2010, combined with the better equipment of the tractors and coupled with the regular annual price increase. In general, we can say that the turnover in tractors is around 35-40% of the total turnover in the agricultural mechanisation. The figures show that three listed groups - 7 brands – cover about 80% of the market.

Numbers and market shares in each group

NO.	GROUP	JAN-OCT 2011		JAN-OCT 2010		2010		2009	
		NUMBER	SHARE	NUMBER	SHARE	NUMBER	SHARE	NUMBER	SHARE
I	CNH	810	35.6	772	39.2	845	38.9	851	38.7
	New Holland	570	25.1	545	27.7	594	27.3	629	28.6
	Case-IH	192	8.4	186	9.4	206	9.5	180	8.2
	Steyr	48	2.1	41	2.1	45	2.1	42	1.9
II	John Deere	529	23.3	390	19.8	436	20.0	417	19.0
III	AGCO	464	20.4	382	19.3	428	19.6	468	21.3
	Fendt	250	11.0	215	10.9	246	11.3	227	10.3
	Massey Ferguson	159	7.0	125	6.3	133	6.1	177	8.1
	Valtra	55	2.4	42	2.1	49	2.2	64	2.9
IV	Same Deutz-Fahr	211	9.2	221	11.3	243	11.1	201	9.1
	Deutz-Fahr	180	7.9	185	9.4	203	9.3	177	8.0
	Same	12	0.5	9	0.5	9	0.4	7	0.3
	Lamborghini	19	0.8	27	1.4	31	1.4	19	0.8
V	Claas	105	4.6	84	4.3	92	4.2	98	4.5
VI	Argo	47	2.1	43	1.2	48	2.2	55	2.5
	Landini	25	1.1	17	0.9	29	1.3	42	1.9
	McCormick	22	1.0	26	1.3	19	0.9	13	0.6
	Other	109	4.8	79	4.0	85	3.9	107	4.9
	Six groups	2,166	95.2	1,892	96.0	2,092	96.1	2,090	95.1
	All brands	2,275	100	1,971	100	2,177	100	2,197	100

The market for tractors in Western Europe and the share of Belgium

The tractor market has expanded to some extent in almost all of Western Europe. In mid-2011, tractor sales in the 19 Western European countries were 15.6% higher than during the previous year. Twelve of the 19 countries recorded an increase of more than 10%, and with its growth rate, Belgium is on par with the European average.

Belgium occupies tenth place in terms of market share. Germany, France and Italy are the leaders in tractor sales, accounting for a share of over 56%. Belgium is small in comparison, but still has a not inconsiderable share of 2.3%.

Western European tractor market by mid-2011

	COUNTRY	JAN-JUN 2011	JAN-JUN 2010	GROWTH RATE
1	France	17,333	14,342	20.9
2	Germany	17,019	12,909	31.8
3	Italy	13,556	12,001	13.0
4	Great Britain	8,559	8,303	3.1
5	Spain	5,163	5,266	-2.0
6	Austria	4,050	4,269	-5.1
7	Finland	3,037	2,548	19.2
8	Sweden	2,276	1,872	21.6
9	The Netherlands	2,020	1,430	41.3
10	**Belgium**	**1,976**	**1,734**	**14.0**
11	Norway	1,911	1,477	29.4
12	Switzerland	1,856	1,623	14.4
13	Portugal	1,697	1,624	4.5
14	Denmark	1,158	904	28.1
15	Ireland	1,150	1,046	9.9
16	Slovenia	875	964	-9.2
17	Greece	292	255	14.5
18	Luxembourg	149	154	-3.2
19	Iceland	22	12	83.3
	TOTAL	84,099	72,733	15.6

% growth in 2011 in comparison to 2010

The figures show that growth in the market for tractors is a widespread phenomenon. We see a steady growth at global level. The figures from Russia stand out. The high percentage can be ascribed to the lifting of import restrictions imposed in 2010. The year 2011 was a year in which the Russians were able to try to catch up with the rest.

Cumulative % growth in comparison to 2010

		JULY 2011	AUG 2011	SEP 2011	OCT 2011
EUROPE					
1	Russia		+104.9	TBA	TBA
2	Germany				+27.5
3	France[1]				+23.5
4	The Netherlands, standard		+22.7	TBA	TBA
	The Netherlands, compact		+3.2		
5	**Belgium**				**+15.4**
6	Ireland			+16.0	TBA
7	Great Britain[2]				+3.7
8	Austria			-6.2	
REST OF THE WORLD					
1	South Africa				+45.7
2	USA				+0.8
3	Canada				+7.4

[1] including garden tractors and telehandlers
[2] from 50 HP onwards
TBA: to be announced

IN THE EUROPEAN PERSPECTIVE

BELGIUM

Summary of machinery statistics

	6 months 2011	6 months 2010	12 months 2010	12 months 2009
Soil cultivation equipment				
Agricultural ploughs	198	170	296	304
Seedbed preparation equipment	258	133	241	224
Rotary harrows	321	362	605	620
Land and croskill roll packer	76	56	88	64
Seeding and planting machines				
Mechanical and pneumatic seed drills	337	223	445	482
Potato planting	39	45	48	47
Machines for spreading fertiliser				
Mounted fertiliser spreaders	326	440	648	639
Trailer-type fertiliser spreader	14	17	42	44
Farmyard manure spreaders	28	30	57	64
Semi-liquid manure spreaders	82	84	129	128
Sprayers				
Mounted, manual folding	78	74	119	99
Mounted, hydraulic folding	83	73	104	80
Trailer-type sprayers	79	54	74	106
Self-propelled sprayers	13	23	30	27
Harvesters				
Combine harvesters	66	36	68	81
Self-propelled forage harvester	17	25	59	50
Pick-up balers	136	133	178	168
Potato harvesting equipment	10	11	45	54
Hay harvesting tools				
Disc mowers	271	268	378	288
Rotary mowers	42	29	53	76
Flail mower conditioners with discs	111	122	186	163
Rotary flail mower conditioners	17	4	6	28
Rotary drum tedders	252	212	350	327
Rakes	382	272	388	434
Self-loading forage trailers	14	17	20	23
Cattle-feeding machinery				
Silage cutters/distributors	46	25	51	68
Diet mixer feeders	51	28	89	72

	6 months 2011	6 months 2010	12 months 2010	12 months 2009
Transport media				
Front loaders	189	149	298	329
Agriculture dump trailers (including silage wagons)	223	269	577	618
Self-propelled telescopic loaders	340	255	509	475
Milking Equipment				
Milking parlour	64	51	106	65
Automatic milking, number of dairy farms	22	40	72	68
Automatic milking, number of milking boxes	31	52	96	89
Milk cooling tanks	109	87	163	142

Garden and horticultural equipment	12 months 2010	12 months 2009
Compact tractors 2-wheel driven tractor	724	772
Compact tractors 4-wheel driven	38	69
Total Compact tractors	762	841
Total two wheeled tractors	4,049	4,520
Engine mowers	30,166	34,173
Rotary mowers, self-pulled	42,943	43,998
Ride-on engine motor mower	10,520	11,695
Flail mowers	186	206
Trimmers	16,410	21,679
Wood brush cutters	23,011	24,208
Chain saws	42,330	41,813
Wood chippers	6,973	8,875
Dethatcher	7,246	5,619
Hedge shears	38,044	38,203
Portable leaf blowers	12,826	13,548

The most striking trends that we can observe from the above table have been described in the pages that follow, and it will be immediately obvious that the general trend of a positive year 2011 is reflected throughout the table.

Soil cultivation equipment

The sales of ploughs have again increased after the difficult years 2009 and 2010. In mid-2011, 16% more ploughs have already been sold than during the same period in 2010 and it looks like that trend will continue. Moreover, the expectations for next year are also favourable. A positive trend has been seen for seedbed preparation equipment since 2009. 2010 was better than 2009, and the first half of 2011 seems to confirm this trend. On the other hand, there has been a drop in the number of rotary harrows. It should also be noted that the second half of the year is an important period for the sale of all soil cultivation machines.

Seeding and planting machines

The sale of mechanical and pneumatic seed drills recovered during the first half of this year, after the slight decline in 2010. The number of potato planting machines has remained stable.

Machines for spreading fertiliser

There was a significant drop in the figures for fertiliser spreading equipment during the first half of 2011, in comparison to last year. There had been moderate growth last year. There is a reversal in this downward trend, albeit to a lesser extent, for trailer-type chemical fertiliser spreaders. Sales of spreaders for farmyard manure and semi-liquid manure are relatively stable.

Spraying and harvesting machines

The sale of mounted as well as trailer-type sprayers is on the rise, and their positive trend therefore continues. On the other hand, the number of self-propelled sprayers sold seems to be falling further.
Temporary relief for combine harvesters. The decrease seen in 2010 seems to have stopped during the first half of 2011. The expectations for this and for the next year are positive. Self-propelled forage harvesters are doing markedly less well in 2011. The number of units sold has halved in 2011 due to the extreme harvesting conditions in autumn 2010. The sale of new forage harvesters is a trade-in issue. The sale of pick-up balers continues to grow. Out of the 136 balers, 58 are big balers and 67 are round balers without bale wrap equipment, 11 round balers are equipped with bale wrap equipment.

Haymaking equipment

The sale of mowers with discs is increasing. Rotary mowers are making a comeback after a slight drop in 2010. Mowers clearly dominate the market. 2011 however has been a less good year for disc-type mower-conditioners. There has been a decline in sales this year compared to last year (2010). The sales of rotary mower-conditioners on the other hand, are rising. 2011 has been better than 2010. Clearly, the spring season was an important one for the sale and utilisation of rotary drum tedders and rakes. There was a sharp rise in the sale of these equipments during the first half of the year. Rotary drum tedders have managed to maintain their positive trend. The sale of rakes is now recovering after the decline in 2010. Self-loading forage trailers seem to be in the grip of a steadily declining market.

Cattle-feeding machinery

The diet mixer feeders are all equipped with one or two vertical screws. The figures show a rising trend

Transport equipment

The number of front loaders is rising again after a drop in 2010. The sale of tipping trailers has fallen further. More than half of the tipping trailers and silage wagons are fitted with 2 axles. The upward trend in self-propelled telescopic loaders however continues. 48% of telescopic loaders have a lifting height between 5.5 and 6.5 m, while 39% have a lifting height between 6.5 and 7.5 metres.

Milking Equipment

The milk price improved by 14% during the first eight months of this year, compared to 2010. That has caused many milk farmers to make investments. This is evidenced by the increase in the number of milking parlours and milk cooling tanks (of increasingly higher capacity). This is also evident in the continued growth in the number of milking robots sold.

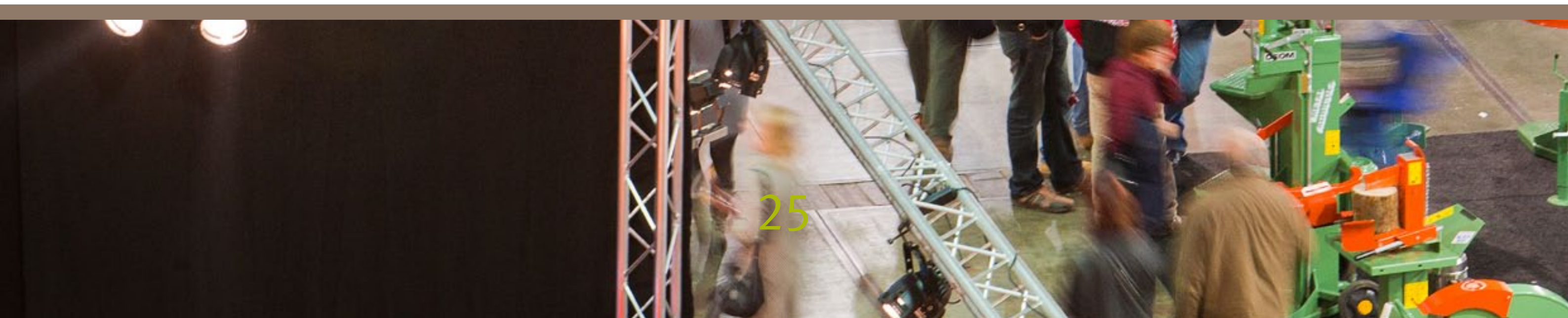
Gardens and green spaces

The turnover in the gardens and green spaces sector will increase slightly this year. The exceptionally warm spring of 2011 boosted sales, but the wet summer that followed caused a flattening of the sales graph and damped the initial euphoria. The figures for some members were missing, and therefore the figures for 2011 have not been shown.

General positive mood

While expectations for gardens and green spaces are moderately positive, the mood for agricultural mechanisation in Belgium is generally positive in almost all sectors, except for the pig industry. This positive mood is further reinforced by recent experiences and results from the Agritechnica. Barely three weeks before AGRIBEX in Brussels, the German branch organisation VDMA made an upward revision in its projections for the German agricultural industry, from 8% to 28% for this year. VDMA expects a slight increase in 2012. The capacity utilisation in the German industry is more than 85% at present. The largest producing country in Europe is widely regarded as the driving force behind agricultural mechanisation in Europe and sets an example in the currently ‘booming’ market.


TORO
SABO
VAN DYCK MARCEL BELG
Provinciebaan 79 • 2235 Houtvenne • Telefoon: (016) 69 91 56 • Telefax:
E-mail: info@vandyck.be • www.vandyck.be
WEIBANG
GARDEN MACHINES
WWW.WEIBANG.COM
DAKOTA
Vandy
gamo



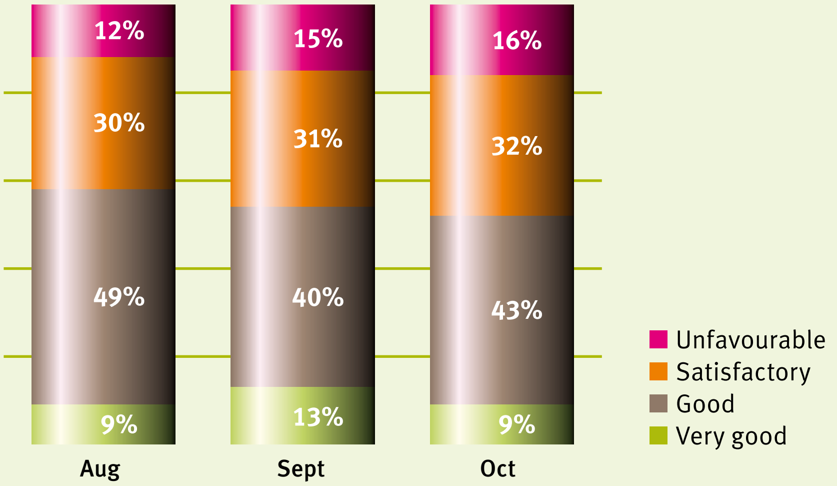
ECONOMIC BAROMETER OF 9 EUROPEAN COUNTRIES

2011 has been a turbulent economic year. The turmoil in the financial markets has certainly not been good for the economy. However, the numbers for international agricultural mechanisation contrast sharply with this negative picture. The figures are positive and encouraging. CEMA, the European Association of Agricultural Machinery Manufacturers, sounds out the mood of its members in nine European countries each month. The CEMA is planning an online survey of 130 officials from the European agricultural mechanisation sector about their expectations about sales, order bookings, production planning, staffing, delivery periods in the tractors, tools, milking machinery, livestock housing technology and components sectors. The survey that CEMA conducted in October 2011 - the highpoint of turmoil in the Eurozone – showed that manufacturers still view the future calmly. 84% of manufacturers surveyed rate their current situation as ‘Reassuring’ to ‘Very Good’. That is by no means a bad score, but represents a slight drop in comparison to August. In terms of turnover, 82% said that their turnover during the next half year shall increase or shall at least remain stable. This again is not bad, but again represents a fall in confidence in comparison to August.

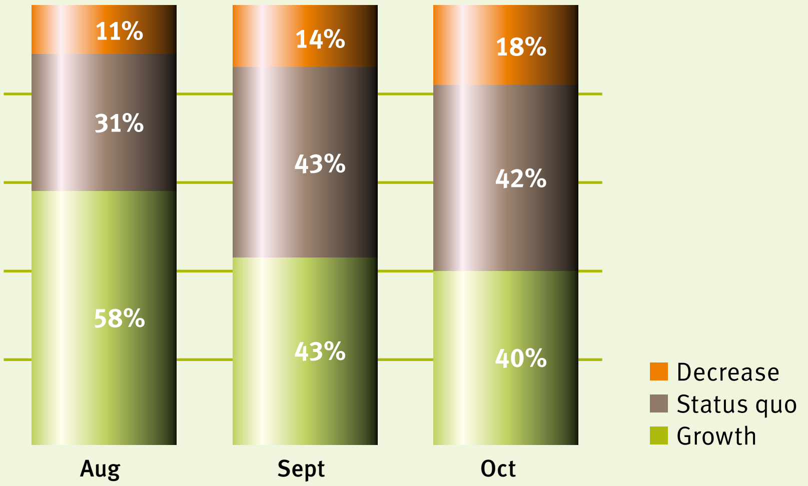
Suppliers of some leading brands of tractors and agricultural machinery recorded double-digit growth this year. There has been an improvement in the figures of most publicly traded multinational companies during the last six to nine months. The Multinational Monitor table shows the results of ten globally active companies that include around 25 brands of tractors, agricultural machinery and machines for gardening, parks, golf, soil cultivation and roadside vegetation. The figures in the table are ranked according to the growth rates in sales as well as profit. These figures also indicate that manufacturers active in the garden and park sector, particularly Husqvarna, are less positive.

Business climate: expectations

Outlook for the year (2011):



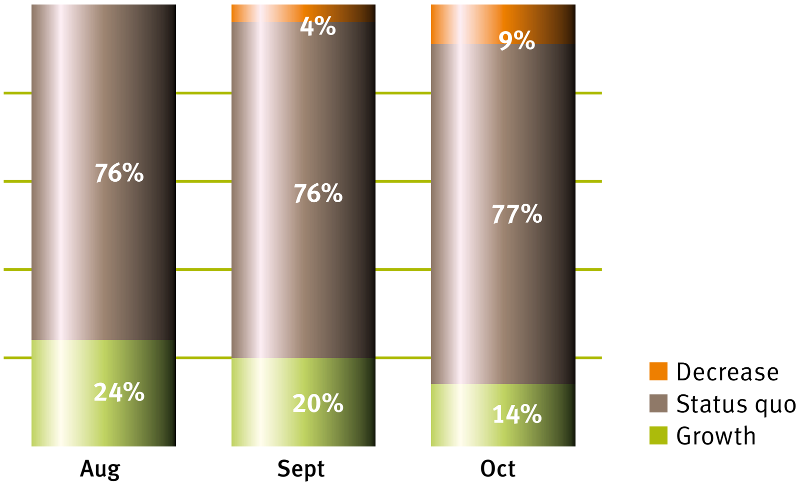
Our turnover figure (2011):



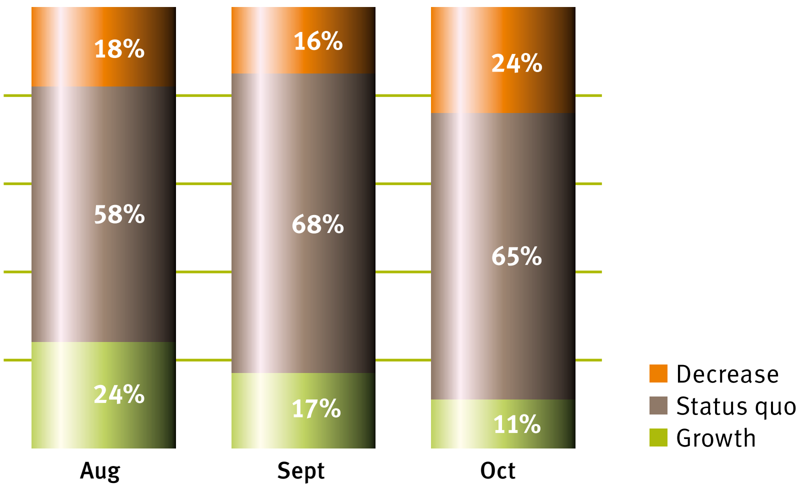
Source: CEMA Business Barometer

Business climate: expectations

Employment (permanent employees in 2011):



Employment (temporary employees in 2011):



Source: CEMA Business Barometer

Multinational Monitor/Turnover figures (in millions)

		PERIOD	2011	2010	%
1	Manitou[4]	9 months	€ 595.2	€ 821.3	+38.0
2	AGCO	9 months	$ 6,255.4	$ 4,728.6	+32.3
3	Kuhn	6 months	CHF 579	CHF 497	+29.7
4	John Deere[2]	9 months[1]	$ 23,401	$ 18,803	+24.5
5	Krone[5]	12 months[1]	€ 405	€ 327	+24.0
6	CNH[3]	6 months	$ 9,247	$ 7,731	+19.6
7	Kverneland	9 months	€ 340.4	€ 293.4	+16.0
8	TORO	9 months[1]	$ 1,516	$ 1,353	+12.0
9	Alamo	6 months	$ 302	$ 269	+12.0
10	Husqvarna	6 months	SEK 18,953	SEK 20,539	-8.0

Multinational Monitor/ (in millions)

		PERIOD	2011	2010	%
1	AGCO	9 months	$ 300	$ 122	+122.2
2	CNH	6 months	$ 472	$ 160	+295
3	Kverneland	6 months	€ 16	€ 7	+149
4	Alamo	6 months	$ 15	$ 9	+64.5
5	Kuhn	6 months	€ 69	€ 45	+54.3
6	John Deere	9 months	$ 2,130	$ 1,408	+51.3
7	TORO	9 months	$ 113	$ 90	+25.2
8	Husqvarna	6 months	SEK 1,165	SEK 1,471	-21.0

[1] figures for part of the financial year,
[2] including garden, park, golf and forestry machinery,
[3] including soil cultivation machinery,
[4] including forklift trucks, telehandlers and aerial work platforms,
[5] only farming equipment

OPPORTUNITIES AND THREATS

We have already stated in this report that the situation for the future is promising. At the same time however, agricultural mechanisation must take into account certain significant trends that are just around the corner. These trends offer opportunities as well as threats. These threats can be turned into opportunities, depending on the approach and the attitude, but for this, Fedagrim must really keep its finger on the pulse.

The shrinking of the agricultural sector. The number of farms has halved in the course of twenty years. This trend continues unabated. In contrast, the scale of the farms that remain, is increasing. This may mean that the demand for machinery may drop in terms of numbers, but that the requirements in relation to equipment shall increase. In other words, there will be a further increase in horsepower ratings and optional accessories.

The explosion in food demand due to the expansion of the world population. According to the Food and Agriculture Organisation of the United Nations, the demand for food will increase by 70% in 2050, with the world population expected to touch 9 billion in 2050, and the changing food composition in emerging economies. Agricultural productivity will therefore have to increase substantially, over a smaller land area.

The agricultural products that form the basis for this food will have to be grown on the same or on an even smaller number of hectares, globally.

Emerging economies will also want to claim their position in the market for tractors, agricultural machinery and other equipment for the sector. The sharply rising labour costs in Belgium may cause problems in this context since it significantly undermines the competitiveness of the Belgian manufacturers in the export market. The outsourcing of manufacturing facilities to low-wage countries is an attractive option in this context. Maintaining research and development, sales, marketing and final assembly within Belgium can lead to high-quality employment and a perfect symbiosis that will enable manufacturers to perfectly cope with the competition, with a combination of increased knowhow and competitive pricing.

In this context, new machines should distinguish themselves with an increase in complexity. This complexity can offer an added value in the competitive position. But complex tractors and agricultural machinery also require larger and stronger dealer structures. In Belgium, work is still required to extend these structures.

Agricultural mechanisation is firmly rooted in reality and in the market. Any changes in the market will have their impact on agricultural production and therefore on mechanisation as well. Regulation is an important issue, with far-reaching consequences. For example, the abolition of the milk quota in 2015, the reform of the Common Agricultural Policy or the strict enforcement of environmental legislation on noise and exhaust fumes.

Market developments have their impact: the pattern of raw material prices (steel, rubber), development of market prices for agricultural products (cereals, milk, potatoes, sugar beets, etc.), mergers and takeovers amongst foreign suppliers, emerging diseases (EHEC in 2011) in both agriculture as well as livestock and the continuing debt crisis that could push Europe into recession.

These need not be threats, but rather issues requiring a creative approach to coping with the situation. As the Belgian Federation for Equipment for Agriculture, Animal Husbandry, Gardens and Green Spaces, Fedagrim will follow these trends very closely and with its members, it will convert them into new growth poles.

GLOBAL DEMAND FOR FOOD

GROWING

According to the United Nations, the seven billionth world citizen was born on the chosen symbolic day of 31st October 2011. Unlike the birth of the fifth and six billionth inhabitant in 1987 and 1999, this milestone is not celebrated. The UN estimates that the increased population will lead to immense problems, such as threats to the environment and access to health care. India is designated as the country where this birth occurred. With more than 1.2 billion people, the country is battling overpopulation and is on the way to overtaking China as the country with the largest population.

Of the 7 billion, 4.2 (60%) live in Asia, 1.2 billion (17%) in India, and 1.4 billion (20%) in China. The European Union has 0.5 billion (7%) residents.

According to the UN's calculations, the world population will grow to nine billion people by 2050. All these people have a right to healthy food. Half of all grains will have to be converted to animal feed in the future in order to meet the increasing demand (the diet is changing due to prosperity) for meat, particularly in emerging economies.

The population will decline for the first time after 2050, possibly very rapidly.

Number of world citizens per hectare of cultivated land

	1950	2000	2050
World population	2.6 billion	6 billion	9.2 billion
Cultivated land available per head of the world population	5,100 m^2	2,200 m^2	2,000 m^2
Number of inhabitants per hectare	1.5	4.2	7.0

Primary sector

Evolution of the number of farms

	BELGIUM 2000	BELGIUM 2010	BELGIUM 2011	FLEMISH REGION 2000	FLEMISH REGION 2010	FLEMISH REGION 2011	WALLOON REGION 2000	WALLOON REGION 2010	WALLOON REGION 2011
Number of farms	61,926	42,854	39,904	41,047	28,331	-	20,843	14,502	-
Area under agricultural cultivation x 1,000 hectares	1,394	1,358	1,337	637	617	611	757	741	726
Average company size	22.5	31.7	33.5	15.5	21.7	-	36.3	51.1	-

Livestock

x 1,000 animals	BELGIUM 2010	BELGIUM 2011	BELGIUM %	FLEMISH REGION 2010	FLEMISH REGION 2011	FLEMISH REGION %	WALLOON REGION 2010	WALLOON REGION 2011	WALLOON REGION %
Poultry	34,375	36,259	5.5	29,125	31,185	7.1	5,249	5,074	-3.3
Pigs	6,430	6,194	-3.7	6,037	5,834	-3.4	392	360	-8.3
Cows	2,593	2,579	-0.5	1,304	1,305	0.1	1,289	1,274	-1.2
Dairy cows in production	500	492	-1.5	285	279	-1.9	215	213	-1.0
Sheep	120	113	-6.3	73	71	-3.2	48	42	-11.1
Hoofed animals (ungulates)	37	37	-0.8	23	24	3.6	14	13	-7.7
Goats	32	35	10.2	22	25	14.5	10	10	0.7

Employment

	BELGIUM 2010	BELGIUM 2011	BELGIUM %	FLEMISH REGION 2010	FLEMISH REGION 2011	FLEMISH REGION %	WALLOON REGION 2010	WALLOON REGION 2011	WALLOON REGION %
Full-time	80,944	74,559	-7.9	56,629	51,680	-8.7	24,315	22,879	-5.9
Part-time	38,027	34,162	-10.2	27,509	24,549	-10.8	10,518	9,613	-8.6

Evolution of crops during the period 2000-2011

		2000 in hectares	2010 in hectares	2011 in hectares	% growth in 2011 in comparison to 2010
1	**Permanent pastures**	**506,946**	**499,687**	**495,024**	**-0.9**
2	**Cereals for grain**	**313,485**	**339,102**	**329,392**	**-2.9**
	Winter corn/cereal	200,600	206,282	185,753	-10.0
	Spring wheat		3,250	7,635	134.9
	Spelt		9,562	9,780	2.3
	Winter rye		459	437	-4.7
	Winter barley	40,349	40,512	40,245	-0.7
	Summer Barley		4,298	4,306	0.2
	Oat		4,876	3,427	-29.7
	Grain maize	35,783	62,531	71,159	13.8
	Triticale (a cross between wheat and rye)		6,666	4,575	-31.4
	Other cereals		668	2,075	210.8
3	**Feed crop**	**266,147**	**267,409**	**270,481**	**1.1**
	Mangel-wurzel/mangold wurzel		3,904	3,576	-8.4
	Green maize	168,892	176,313	175,504	-0.5
	Other annual fodder		2,752	4,937	79.4
	Soilage, green crop/fodder		4,720	4,440	-5.9
	Temporary pastures	84,764	79,350	81,263	2.4
4	**Industrial crops**	**133,307**	**92,491**	**88,468**	**-4.3**
	Sugar beet	90,858	59,303	62,257	5.0
	Chicory		8,126	6,733	-17.1
	Flax		11,048	6,130	-44.5
	Rape seed		11,279	12,404	10.0
	Agricultural seeds		1,538	458	-70.2
5	**Potatoes**	**65,844**	**81,760**	**79,753**	**-2.5**
	Early potatoes		12,708	12,537	-1.3
	Ware potatoes/potato for winter storing				
	Early summer potato		42,254	38,574	-8.7
	Other varieties		323,680	25,722	8.6
	Seed potato		3,118	2,920	-6.3
6	**Outdoor vegetables**	**34,829**	**40,941**	**39,697**	**-3.0**
7	**Cultivation of perennials**	**20,642**	**21,674**	**21,378**	**-1.4**
	Nurseries in the open air		4,936	4,817	-2.4
	Orchards		16,363	16,171	-1.2
8	**Fallow land**	**20,097**	**9,592**	**7,188**	**-25.1**
9	**Cultivation in greenhouses**	**2,015**	**2,140**	**1,747**	**-18.3**
10	**Dried pulses**	**2,215**	**2,053**	**3,132**	**52.6**
	Other use	28,556	370	945	
	Area under agricultural cultivation in hectares	1,394,083	1,358,019	1,337,205	-1.5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Use of land area under cultivation in Flanders and Wallonia

		BELGIUM	BELGIUM	BELGIUM	FLEMISH REGION	FLEMISH REGION	FLEMISH REGION	WALLOON REGION	WALLOON REGION	WALLOON REGION
		2010 In hectares	2011 In hectares	%	2010	2011	%	2010	2011	%
1	**Permanent pastures**	**499,687**	**495,024**	**-0.9**	**160,648**	**159,963**	**-0.4**	**339,039**	**335,061**	**-1.2**
2	**Cereals for grain**	**339,102**	**329,392**	**-2.9**	**149,359**	**143,949**	**-3.6**	**189,743**	**185,443**	**-2.3**
	Winter corn/cereal	206,282	185,753	-10.0	72,942	56,704	-22.3	133,340	129,049	-3.2
	Spring wheat	3,250	7,635	134.9	1,266	5,141	306.2	1,984	2,494	25.7
	Spelt	9,562	9,780	2.3	473	499	5.6	9,089	9,281	2.1
	Winter rye	459	437	-4.7	186	240	29.0	273	198	-27.6
	Winter barley	40,512	40,245	-0.7	10,963	11,199	2.2	29,549	29,046	-1.7
	Summer Barley	4,298	4,306	0.2	1,136	2,051	80.5	3,161	2,255	-28.7
	Oat	4,876	3,427	-29.7	917	688	-25.0	3,959	2,738	-30.8
	Grain maize	62,531	71,159	13.8	57,377	64,660	12.7	5,155	6,499	26.1
	triticale (a cross between wheat and rye)	6,666	4,575	-31.4	3,969	2,738	-31.0	2,697	1,837	-31.9
	other cereals	668	2,075	210.8	131	28	-78.4	537	2,046	281.1
3	**Feed crop**	**267,409**	**270,481**	**1.1**	**178,334**	**182,287**	**2.2**	**89,075**	**88,194**	**-1.0**
	Mangel-wurzel/ mangold wurzel	3,904	3,576	-8.4	2,956	2,763	-6.5	948	813	-14.2
	Green maize	176,313	175,504	-0.5	117,654	118,764	0.9	58,659	56,741	-3.3
	Other annual fodder	2,752	4,937	79.4	396	2,875	625.7	2,356	2,062	-12.5
	Soilage, green crop/fodder	4,720	4,440	-5.9	2,431	2,507	3.1	2,289	1,933	-15.6
	Temporary pastures	79,350	81,263	2.4	54,758	55,009	0.5	24,592	26,254	6.8
4	**Industrial crops**	**92,491**	**88,468**	**-4.3**	**28,359**	**27,203**	**-4.1**	**64,131**	**61,265**	**-4.5**
	Sugar beet	59,303	62,257	5.0	20,749	21,709	4.6	38,554	40,548	5.2
	Chicory	8,126	6,733	-17.1	1,631	1,259	-22.8	6,495	5,474	-15.7
	Flax	11,048	6,130	-44.5	3,419	2,914	-14.8	7,629	3,216	-57.8
	Rape seed	11,279	12,404	10.0	652	778	19.3	10,627	11,626	9.4
	Agricultural seeds	1,538	458	-70.2	1,330	202	-84.8	208	255	22.9
5	**Potatoes**	**81,760**	**79,753**	**-2.5**	**46,671**	**47,073**	**0.9**	**35,089**	**32,680**	**-6.9**
	Early potatoes	12,708	12,537	-1.3	10,881	11,019	1.3	1,827	1,518	-16.9
	Ware potatoes/potato for winter storing									
	Early summer potato	42,254	38,574	-8.7	20,966	19,223	-8.3	21,288	19,351	-9.1
	Other varieties	323,680	25,722	8.6	13,086	15,032	14.9	10,594	10,689	0.9
	Seed potato	3,118	2,920	-6.3	1,738	1,799	3.5	1,380	1,121	-18.8
6	**Vegetables in open air** (incl. strawberries)	**40,941**	**39,697**	**-3.0**	**27,559**	**27,371**	**-0.7**	**13,382**	**12,325**	**-7.9**
7	**Cultivation of perennials**	**21,674**	**21,378**	**-1.4**	**19,355**	**19,322**	**-0.2**	**2,319**	**2,055**	**-11.4**
	Nurseries	4,936	4,817	-2.4	4,206	4,390	4.4	730	427	-41.5
	Orchards	16,363	16,171	-1.2	14,835	14,617	-1.5	1,528	1,554	1.7
8	***Fallow land***	***9,592***	***7,188***	***-25.1***	***3,125***	***524***	***-83.2***	***6,467***	***6,664***	***3.0***
9	**Cultivation in greenhouses**	**2,140**	**1,747**	**-18.3**	**2,071**	**1,708**	**-17.5**	**69**	**39**	**-43.2**
10	**Dried pulses**	**2,053**	**3,132**	**52.6**	**604**	**526**	**-12.9**	**1,449**	**2,607**	**79.9**
	Other uses	370	*945*							
	Area under agricultural cultivation in hectares	1,358,019	1,337,205	-1.5	617,134	610,808	-1.0	740,885	726,397	-2.0

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Members of Fedagrim

	NAME	SINCE	IMPORT./ MANU.	CAT A/F	SECTORAL SUBGROUP G1	G2	G3	G4	MEMBER AGORIA	MEMBER AGRIMADIS
1	AGRIMAC NV	03/11	i	EFF		G2				X
2	AGROPAK BVBA	91	I	EFF		G2	G3	G4		X
3	AG-TEC SA	07/04	I	EFF	G1	G2				X
4	ALTEZ NV	12/94	C	EFF			G3			
5	ANDREAS STIHL NV	91	I	EFF				G4		X
6	ATELIERS ROBERT SA	4/95	C/I	EFF		G2				X
7	AVR BVBA	03	C	EFF		G2			X	
8	BEEUWSAERT CONSTRUCT BVBA	07/06	C	EFF			G3			
9	BETONBEDRIJF DOBBELAERE - BONTE NV	3/97	C	EFF			G3			
10	BEYNE NV	11/97	C	EFF		G2			X	
11	BOUMATIC - MELOTTE SPRL	01/05	I	EFF			G3		X	X
12	CNH BELGIUM NV - NEW HOLLAND BRAND	91	C/I	EFF	G1	G2			X	X
13	CNH BELGIUM NV - CASEIH / STEYR BRANDS	09/03	I	EFF	G1				X	
14	COBEFA BVBA	9/97	C	EFF			G3			
15	COFABEL NV-SA	91	I	EFF	G1	G2				X
16	CONSTRUCTIEWERKHUIZEN DEWULF NV	91	C	EFF		G2			X	
17	DE JAEGER NV	04/02	I	EFF			G3			
18	DELAVAL NV	91	I	EFF			G3			X
19	DE LILLE TESTCENTRUM NV	10/95	I	EFF	G1			G4		X
20	DELVANO NV	91	C	EFF		G2		G4	X	
21	DENSERCO SA	07/07	I	EFF				G4		X
22	DEWA NV	12/02	C	EFF		G2				
23	DEZEURE BVBA	91	C	EFF		G2				
24	ELIET EUROPE NV	5/94	C	EFF				G4	X	
25	ETESIA SARL	05	C	TOE				G4		
26	ETS DEPIERE NV	05	I	EFF				G4		X
27	ETS JOSKIN SA	91	C/I	EFF		G2				X
28	EUROGARDEN NV	91	I	EFF				G4		X
29	FAGADIS SA	07/01	I	EFF				G4		X
30	FULLWOOD NV	01/05	I	EFF			G3			X
31	GASPART SA-NV	91	I	EFF	G1	G2				X
32	GEA FARM TECHNOLOGIES BELGIUM NV	91	I	EFF			G3			X
33	GEBROEDERS VAN HESSCHE BVBA	9/97	C	EFF			G3			
34	GEBRS. CLAEYS & ZONEN BVBA	12/94	C	EFF		G2				
35	GGP BENELUX BV	2/93	C	EFF				G4		
36	GILLES CLERMONT SA	07/07	C	EFF		G2			X	
37	HALLOY ET FILS ETS	91	I	EFF		G2	G3			X
38	HILAIRE VAN DER HAEGHE NV	91	I	EFF	G1	G2		G4		X
39	HITACHI POWER TOOLS BELGIUM NV SA	07/07	I	EFF				G4		X
40	HOCKE SA-NV	91	I	EFF	G1					X
41	HONDA BELGIUM NV - AFDELING POWER EQUIPMENT	91	I	EFF				G4	X	X
42	HUSQVARNA BELGIUM SA	8/91	I	EFF				G4		X

ADDRESS	ZIP	CITY	PHONE	FAX
MARVIJLESTRAAT 53	9690	KLUISBERGEN	055/38 84 64	055/38 78 35
SCHOEBROEKSTRAAT 58 I.Z. PAAL	3583	PAAL-BERINGEN	011/45 07 20	011/42 96 76
BOOMSESTEENWEG 174	2610	WILRIJK	03/821 08 33	03/821 08 80
IND.ZONE N. – SZAMOTULYSTR. 51	8700	TIELT	051/25 99 99	051/25 99 98
VEURTSTRAAT 117	2870	PUURS	052/30 00 80	052/30 13 57
RUE DE REPPE 20E	5300	SEILLES – ANDENNES	085/84 96 70	085/84 96 71
MEENSESTEENWEG 545	8800	ROESELARE	051/24 55 66	051/22 95 61
NIJVERHEIDSLAAN 3	8880	LEDEGEM	056/43 18 43	056/41 28 48
GALGENVELDSTRAAT 31	8700	TIELT	051/40 09 10	051/40 63 17
ENGELSTRAAT 123	8480	ICHTEGEM	051/58 85 34	051/58 21 73
RUE JULES MELOTTE 31	4350	REMICOURT	019/54 42 66	019/54 55 44
LEON CLAEYSSTRAAT 3 A	8210	ZEDELGEM	050/25 30 42	050/25 36 61
LEON CLAEYSSTRAAT 3 A	8210	ZEDELGEM	0473/30 08 67	03/385 18 27
LINTEWEVERSSTRAAT 21	7780	KOMEN	056/55 48 53	056/55 48 52
PEPERSTRAAT 4A	3071	ERPS-KWERPS	02/759 40 93	02/759 99 28
MOORSEELSESTEENWEG 20	8800	ROESELARE-RUMBEKE	051/20 58 71	051/21 11 82
GROENDREEF 22	9880	AALTER	09/325 75 15	09/374 06 95
INDUSTRIEPARK DRONGEN 10	9031	DRONGEN	09/280 91 00	09/280 91 30
HULSTSESTRAAT 2	8860	LENDELEDE	056/73 80 80	056/70 56 50
KUURNSESTRAAT 20-22	8531	HARELBEKE-HULSTE	056/71 55 21	056/70 47 19
RUE DU MANEGE 18	1301	BIERGES	010/42 02 60	010/42 02 69
GROTE MOERSTRAAT 4	9940	EVERGEM	09/253 05 84	09/253 40 98
IZENBERGESTRAAT 5	8630	VEURNE-VINKEM	058/28 00 80	058/28 00 88
DIESVELDSTRAAT 2	8553	OTEGEM	056/77 70 88	056/77 52 13
RUE DE L'INDUSTRIE 13	F-67165	WISSEMBOURG	0033/388 54 89 00	0033/388 94 06 24
INDUSTRIELAAN 80	7700	MOESKROEN	056/34 09 07	056/34 09 39
RUE DE WERGIFOSSE 39	4630	SOUMAGNE	04/377 35 45	04/377 10 15
SINT-TRUIDENSESTEENWEG 252	3300	TIENEN	016/80 54 39	016/80 54 38
RUE DE VILLERS 34	4520	WANZE	085/61 62 00	085/61 62 10
CARDIJNLAAN 10	8600	DIKSMUIDE	051/55 00 20	051/50 53 20
Z4 BROEKOOI 190	1730	ASSE	02/467 38 11	02/467 38 22
HAGELBERG 1	2550	OLEN	014/28 28 90	014/21 05 07
INDUSTRIELAAN 5	8740	PITTEM-EGEM	051/46 67 58	051/46 66 69
OUDE KASTEELDREEF 1	9990	MALDEGEM	050/71 14 70	050/71 54 76
GALGENVELDSTRAAT 25A	8700	TIELT	051/46 00 00	051/46 67 27
RUE DE STREE 90	5650	CLERMONT	071/20 06 20	071/20 06 29
RUE DU FOURNEAU 49	5620	SAINT AUBIN	071/68 81 66	071/68 75 47
BOOMSESTEENWEG 174	2610	WILRIJK	03/821 08 30	03/821 08 80
KONINGIN ASTRIDLAAN 51	1780	WEMMEL	02/456 11 71	02/456 11 75
A. GOSSETLAAN 13	1702	GROOT-BIJGAARDEN	02/467 28 11	02/467 29 93
SPHERE BUSINESS PARK ZONING 3 DOORNVELD 181-184	1731	ZELLIK	02/620 10 00	02/620 11 49
ZI 2 AVENUE DES ARTISANS 50	7822	ATH (GHISLENGHIEN)	068/25 14 10	068/25 14 50

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	NAME	SINCE	IMPORT./ MANU.	CAT A/F	SECTORAL SUBGROUP G1	G2	G3	G4	MEMBER AGORIA	MEMBER AGRIMADIS
43	INDUMA BVBA	04/99	I	EFF				G4		X
44	IPSAM INTERNATIONAAL NV	91	C	EFF		G2			X	
45	J.C.B. BELGIUM NV	12/98	I	EFF	G1			G4		X
46	JEAN HEYBROEK BVBA	06/10	I	EFF				G4		
47	KEMPENEER W. MACHINES NV	91	I	EFF				G4		X
48	KRUSE OOTMARSUM	06	I	TOE		G2		G4		
49	KVERNELAND GROUP BENELUX BV	92	I	EFF		G2				X
50	LELY NEDERLAND NV	01/05	I	EFF		G2	G3			
51	LEMKEN GmbH & CO KG	04/09	I	EFF		G2				
52	LIMKO NV	91	I	EFF			G3			X
53	LOUIS NAGEL BV	07/11	I	TOE	G1	G2		G4		
54	M.D.M. INDUSTRIE SA	9/97	C/I	EFF		G2				X
55	MAHIEU METAALBOUW BVBA	7/00	C	EFF			G3		X	
56	MAKITA NV	6/10	I	EFF				G4		
57	MANITOU BENELUX SA NV	5/98	I	EFF	G1					X
58	MATERA NV	11/01	I	EFF	G1	G2				X
59	MATERMACO NV	91	I	EFF	G1	G2		G4		X
60	MECHATRAC BV	10/02	I	TOE		G2				
61	MENART SPRL	91	C/I	EFF				G4	X	X
62	MORTI NV	4/96	C	EFF			G3			
63	MUELLER SALES	7/00	I	TOE			G3			
64	NEIRINCK STALINRICHTINGEN BVBA	3/02	C/I	EFF			G3			
65	PACKO AGRI NV	91	I	EFF		G2		G4		X
66	PACKO INOX NV	91	C	EFF			G3		X	
67	PIVABO BVBA	06	I	EFF				G4		X
68	RDS ELECTRONICS BVBA	5/98	I	EFF		G2				X
69	ROXELL NV	91	C	EFF			G3		X	
70	SLOOTSMID TRADING BV	11/08	I	TOE	G1	G2				X
71	STEENO NV	91	C	EFF		G2			X	
72	THOMAS	3/03	I	EFF				G4		X
73	TORO EUROPE NV	91	I	EFF				G4		X
74	VAN DYCK MARCEL BELGIUM NV	91	I	EFF				G4		X
75	VANDAELE KONSTRUKTIE NV	91	C	EFF				G4	X	
76	VANDERSTICHELEN SA	91	I	EFF		G2				X
77	VANPETEGHEM A & G BVBA	6/99	C	EFF			G3			
78	VANPETEGHEM LANDBOUWMACHINES NV SA	91	C/I	EFF	G1	G2	G4			X
79	VDV BETON NV	10/94	C	EFF			G3			
80	VERVAEKE BVBA-SPRL	7/95	C	EFF			G3			

NUMBERS	Tot.	EFF	TOE	G1	G2	G3	G4	Agoria	Agrimadis
TOTAL MEMBERS	80	74	6						
TOTAL GROUPS				15	34	23	31	17	43

ADDRESS	ZIP	CITY	PHONE	FAX
ALBERT DEHEMLAAN 5B	8900	IEPER	057/20 77 56	057/20 59 13
RIJKMAKERLAAN 16	2910	ESSEN	03/670 17 70	03/670 17 80
BETEKOMSESTEENWEG 124	3200	AARSCHOT	016/55 11 55	016/56 90 53
TORHOUTSESTEENWEG 166	8210	ZEDELGEM	050/82 01 71	0031/306 394 655
NINOOFSESTWG 657	1701	DILBEEK	02/569 42 54	02/569 36 12
POSTBUS 78	NL-7630	AB OOTMARSUM	0031/541 291 756	0031/541 293 578
ESSENESTRAAT 18A	1740	TERNAT	02/582 80 02	02/582 75 01
WEVERSKADE 110	NL-3147	PA MAASSLUIS	0031/105 996 333	0031/105 996 343
VARENDONK 10	9940	SLEIDINGE	0474/97 46 22	09/328 65 69
ASSESTEENWEG 136	7850	EDINGEN	02/395 85 00	02/395 51 36
WESTKANAALDIJK 439	NL-6545	AA NIJMEGEN	0031/243 716 600	0031/243 722 270
CHEMIN DE MOSSEE 4	5590	CINEY	083/21 15 78	083/21 57 48
RUE DES RUBANIERS 2	7780	COMINES	056/55 40 40	056/55 40 60
MECHELSESTEENWEG 323	1800	VILVOORDE	02/257 18 46	02/257 18 65
Z.I. PERWEZ- CHAUSSÉE DE WAVRE 21	1360	PERWEZ	081/65 42 30	081/65 42 42
ZI DE SAUVENIERE - RUE DES PRAULES 3A	5030	GEMBLOUX	081/62 75 00	081/62 75 00
ZI DE SAUVENIERE - RUE DES PRAULES 3A	5030	GEMBLOUX	081/62 75 00	081/62 75 00
POLLAAN 49	NL-7202	BV ZUTPHEN	0031/575591911	0031/575591935
RUE BENOIT 31	7370	DOUR	065/61 07 60	065/61 07 49
BOOIEBOS 10	9031	DRONGEN	09/282 48 77	09/282 45 09
NARCISSTRAAT 14	9404	RK ASSEN	0031/592361600	0031/592361601
GROENE SPRIETSTRAAT 7	8755	RUISELEDE	051/68 83 75	051/68 75 30
TORHOUTSESTEENWEG 166	8210	ZEDELGEM	050/25 00 10	050/25 00 50
TORHOUTSESTEENWEG 154	8210	ZEDELGEM	050/25 06 00	050/20 07 52
GEN. LEMANSTRAAT 92	8930	MENEN	056/51 52 50	056/53 19 34
GROOT BRITTANIELAAN 2	8970	POPERINGE	057/33 55 77	057/33 82 65
INDUSTRIELAAN 13	9990	MALDEGEM	050/72 91 72	050/71 67 21
GRUTTOSTRAAT 51	NL-7471	ER GOOR	0031/547 584 110	0031/547 284 111
OUDENAARDESTRAAT 45	8570	VICHTE	056/77 70 01	056/77 77 00
BRUSSELSESTEENWEG 144	1785	MERCHTEM	052/37.22.73	052/37.37.40
NIJVERHEIDSSTRAAT 5	2260	OEVEL	014/56 29 60	014/56 29 51
PROVINCIEBAAN 79	2235	HOUTVENNE	016/69 91 56	016/69 62 53
STATIONSSTRAAT 117	8780	OOSTROZEBEKE	056/66 45 01	056/66 30 40
RUE DE LA CORTEWILDE 30	7781	HOUTHEM	056/56 05 50	056/56 05 56
ZWARTESTRAAT 41	8647	RENINGE	057/40 01 43	057/40 08 06
ST-ELOOISTRAAT 40	8840	WESTROZEBEKE	051/70 11 14	051/70 35 24
MEERSEWEG 135 A	2321	MEER-HOOGSTRATEN	03/315 72 72	03/315 87 12
INDUSTRIESTRAAT 8C	8755	RUISELEDE	051/68 97 73	051/68 99 92


DEWA

Sources

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Colophon

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Fedagrim vzw
Jules Bordetlaan 164/4, B-1140 Brussels – Tel +32 2 262 06 00 – Fax +32 2 262 04 02 – www.fedagrim.be