

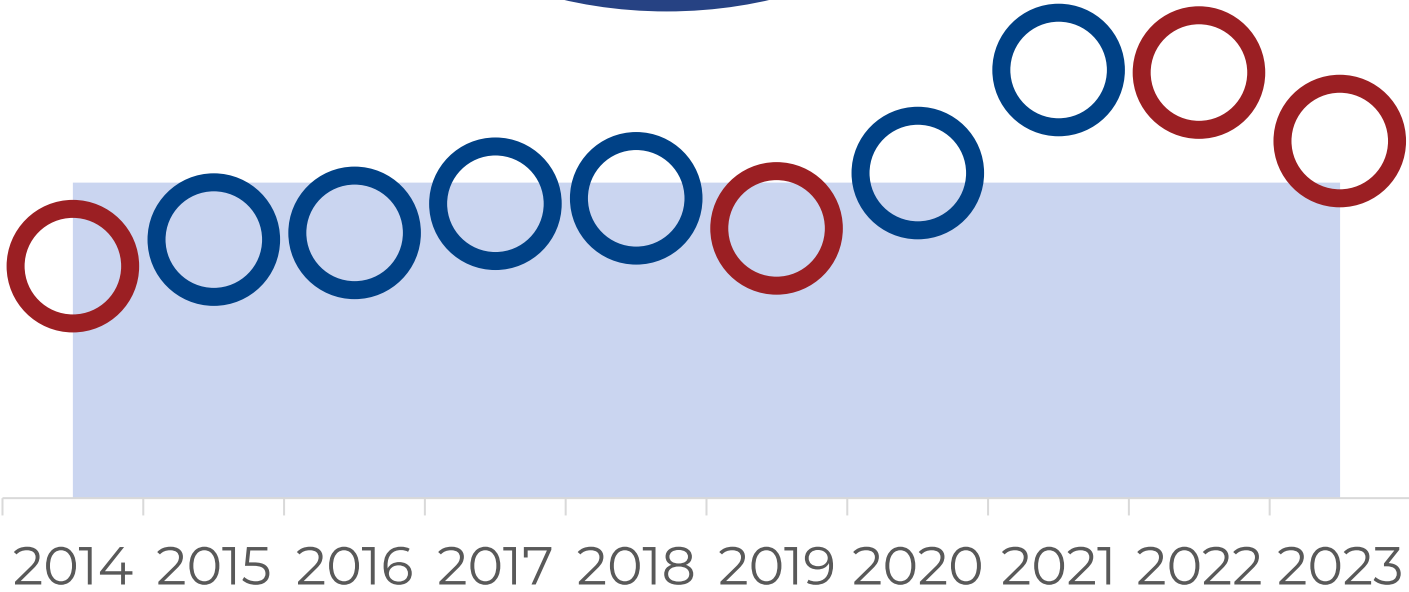
Industry Update to end June 2023

YTD end June 2023



All Tractors

7,670
↓ 16%

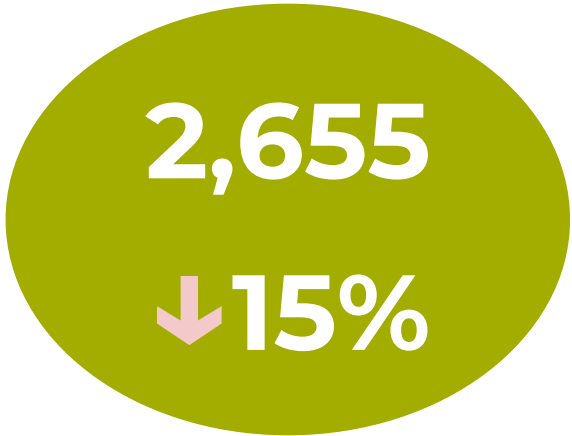


■ Growth
■ Decline

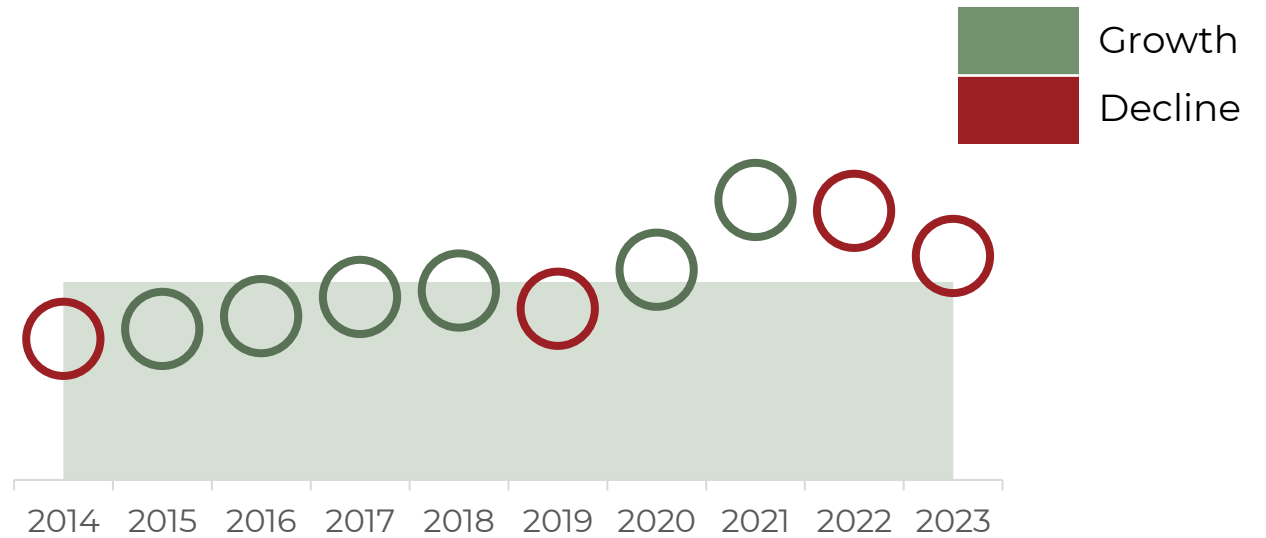
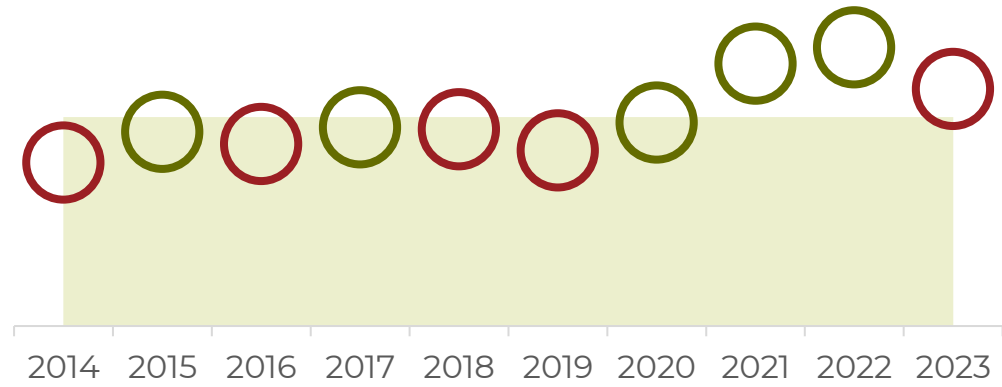
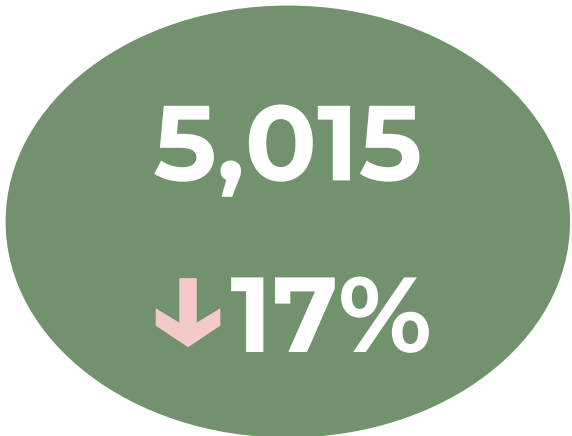
YTD end June 2023



<60Hp
Tractors



60+Hp
Tractors

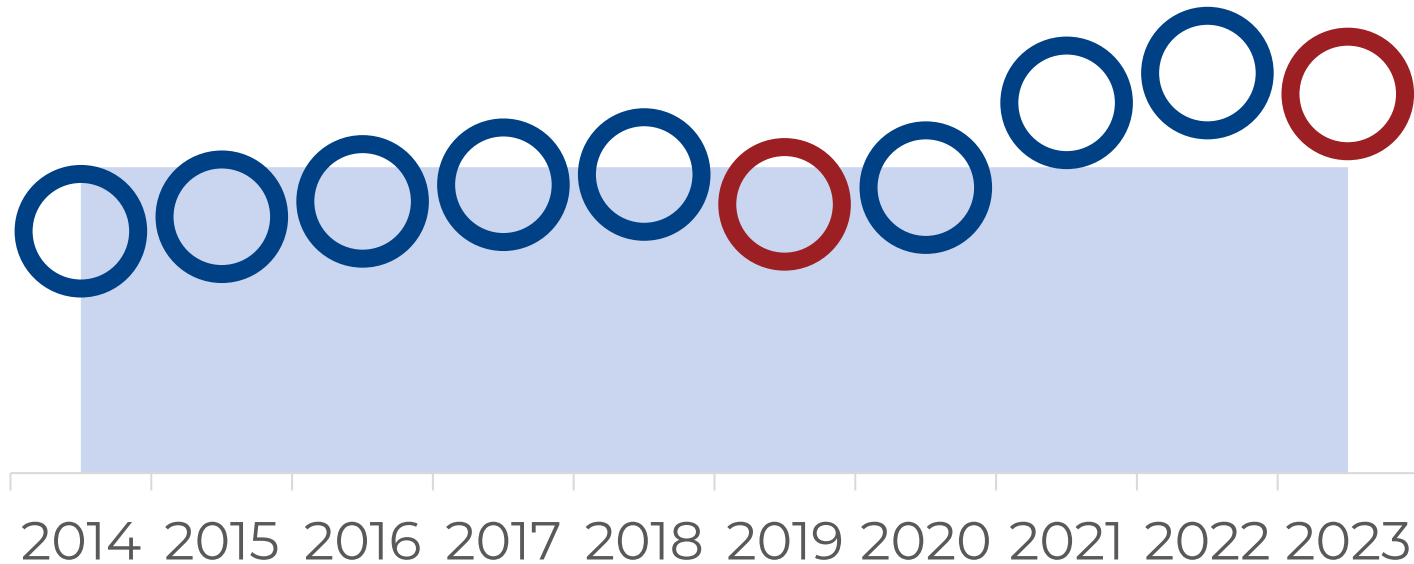


Rolling 12 Months to end June 2023



All Tractors

16,230
↓ 5%

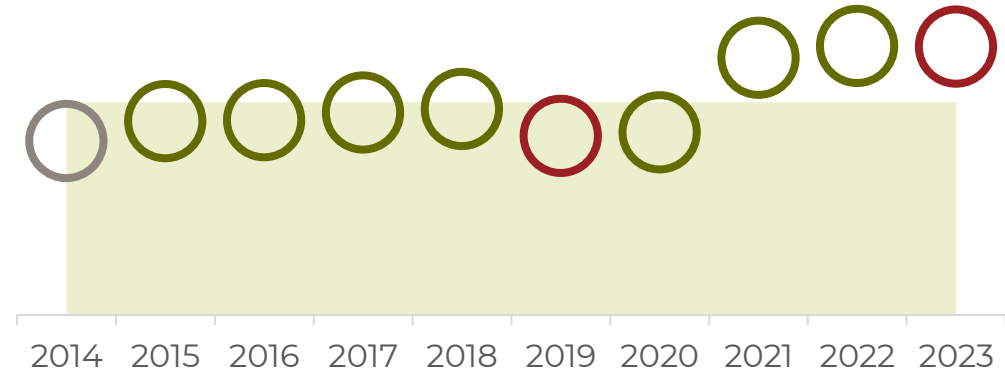


■ Growth
■ Decline

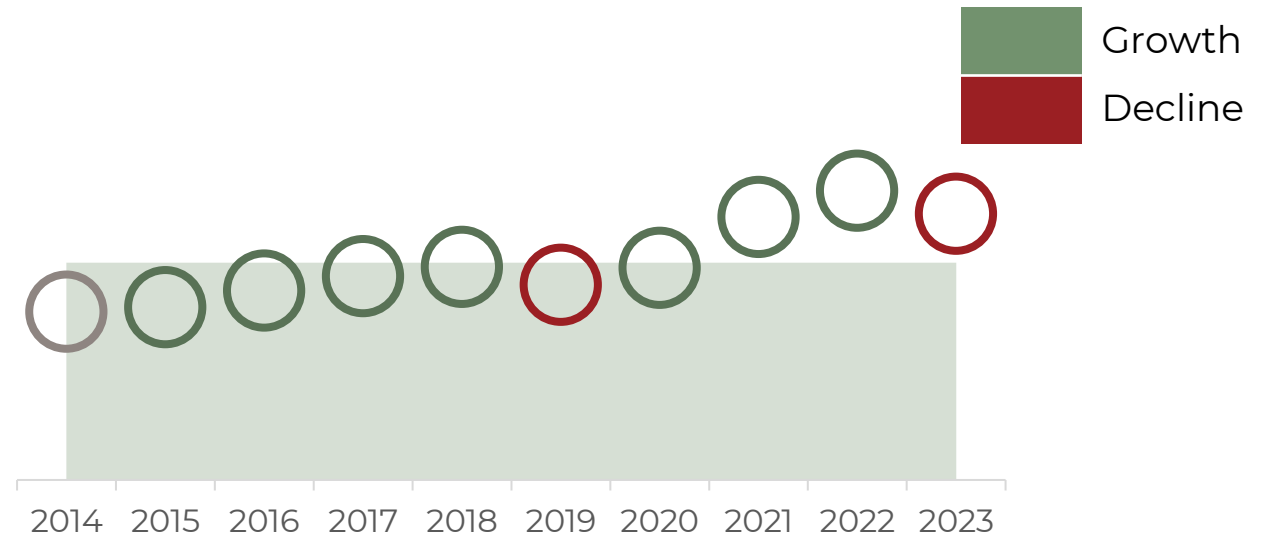
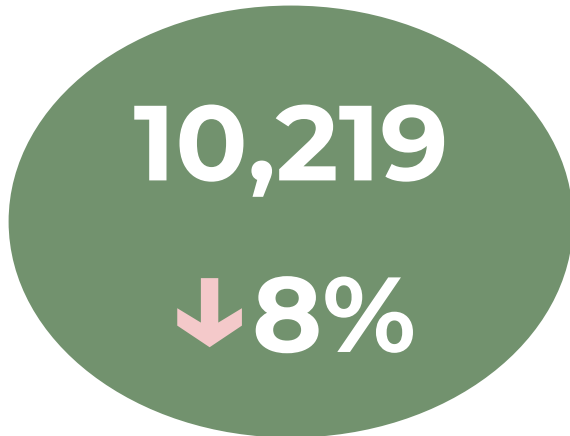
Rolling 12 Months to end June 2023



<60Hp
Tractors



60+Hp
Tractors

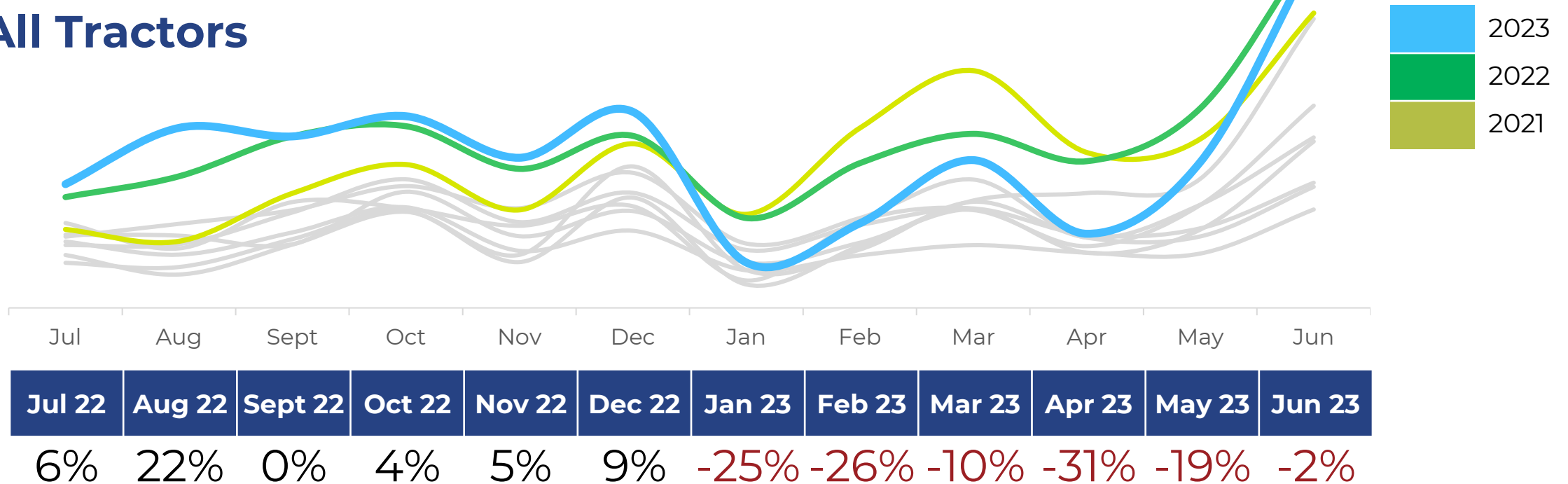


■ Growth
■ Decline

Rolling 12 Months to end June



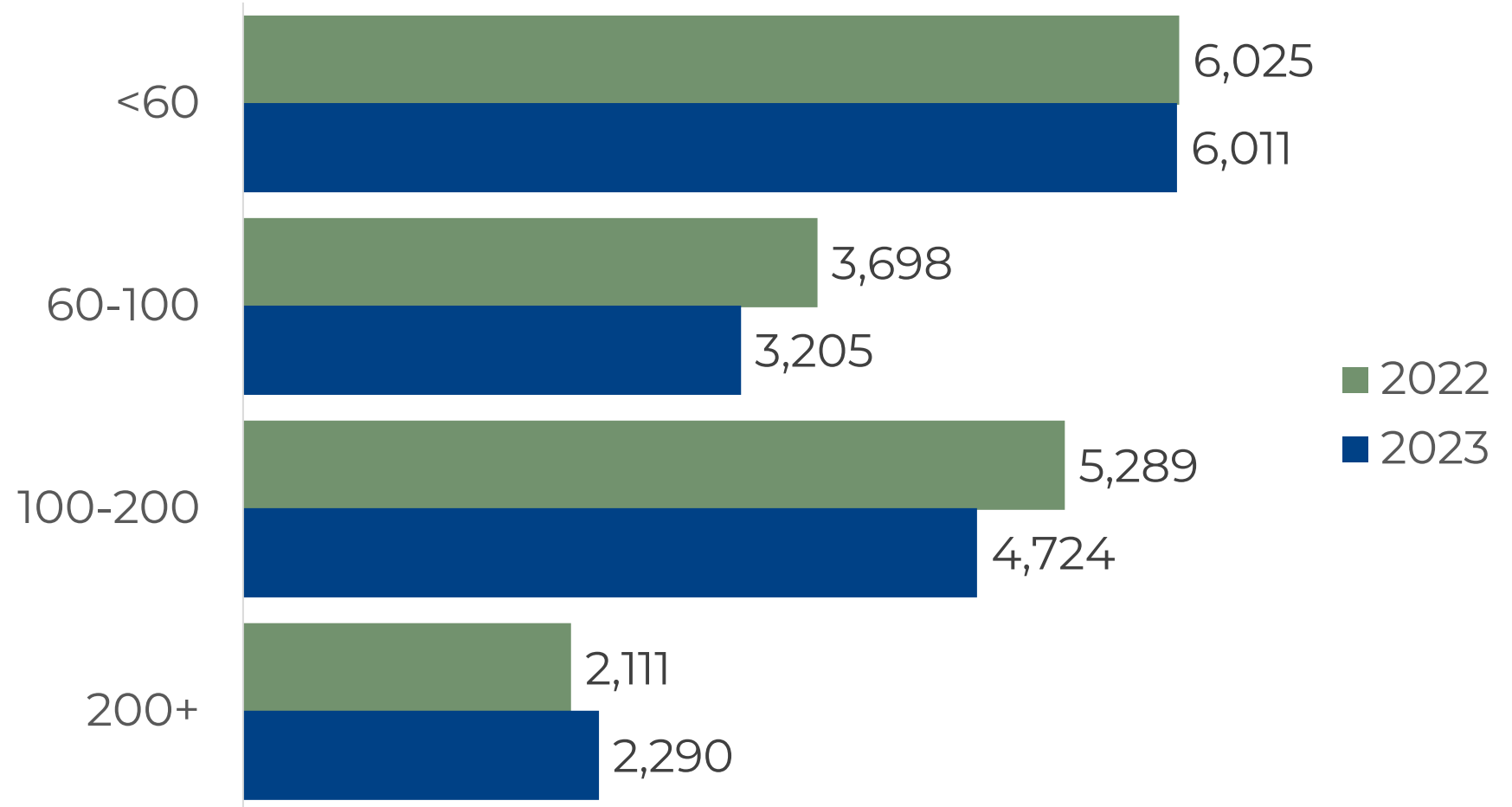
All Tractors



Rolling 12 Months to end June



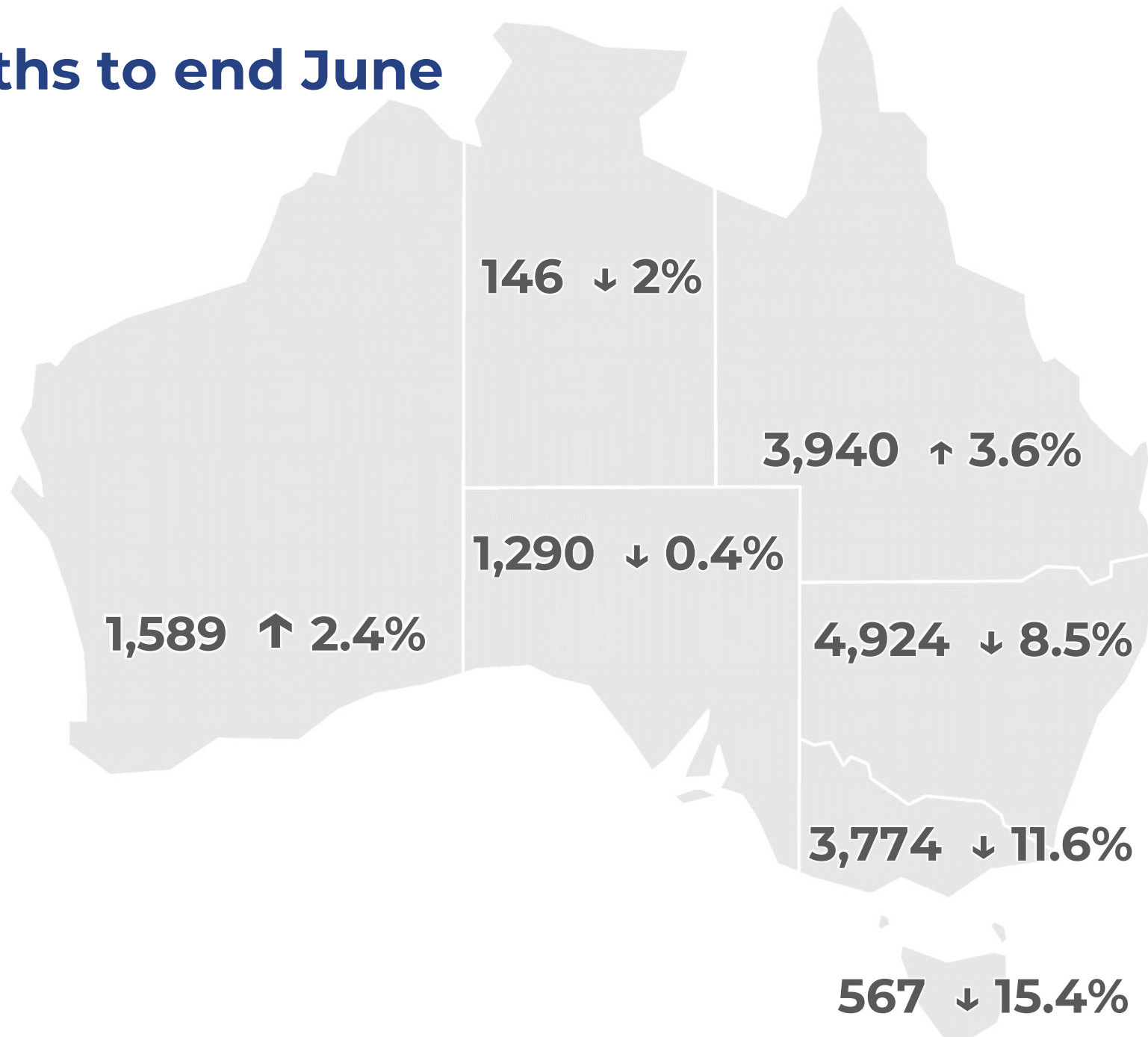
All Tractors



Rolling 12 Months to end June



All Tractors



MachineryTrak Demand Forecaster



Tractor Demand Forecaster

Filter by

State: (All) | NCSA2: (All) | HP Range: (All) | Latest Year for analysis: 2023



Global summary

Select a State to filter the entire view

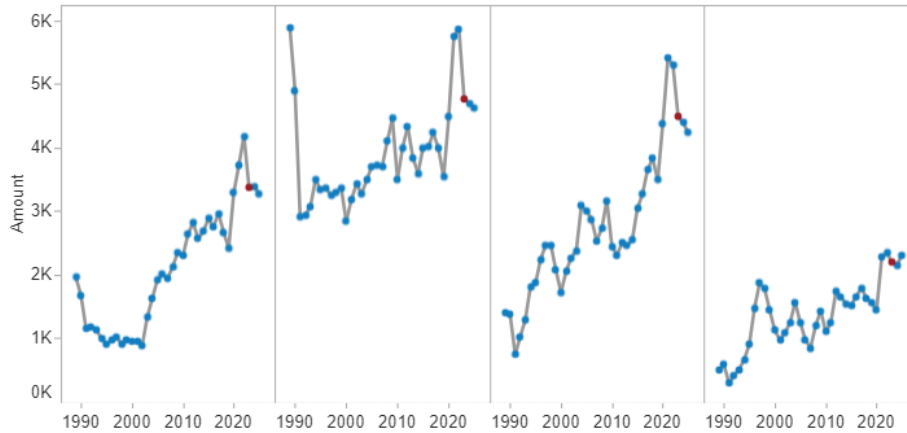
CY 2022	CY 2023	Variation
17,702	14,862	-16.04%



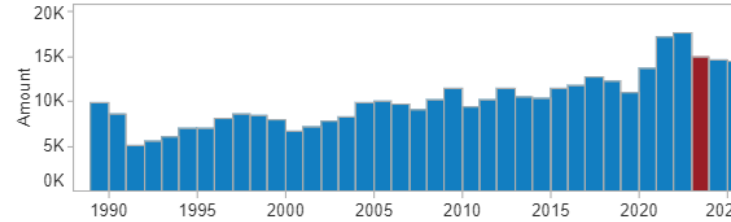

2023 demand by HP Range

Dimension: HP Range

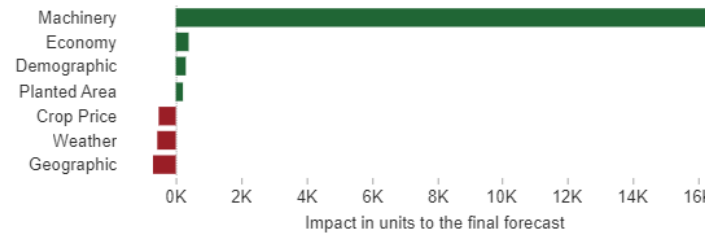
0 - 40 HP	40 - 100 HP	100 - 200 HP	200 - Plus HP
3,383	4,771	4,497	2,211



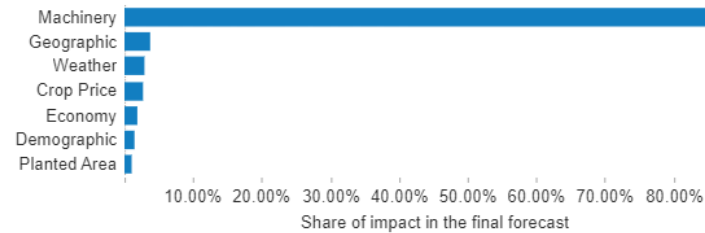
Historical annual demand



Driver impact



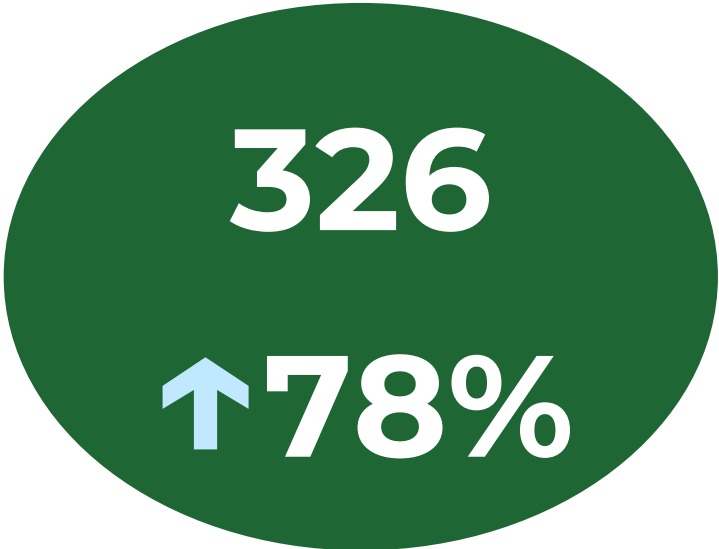
Most important drivers



YTD end June 2023



All Combines



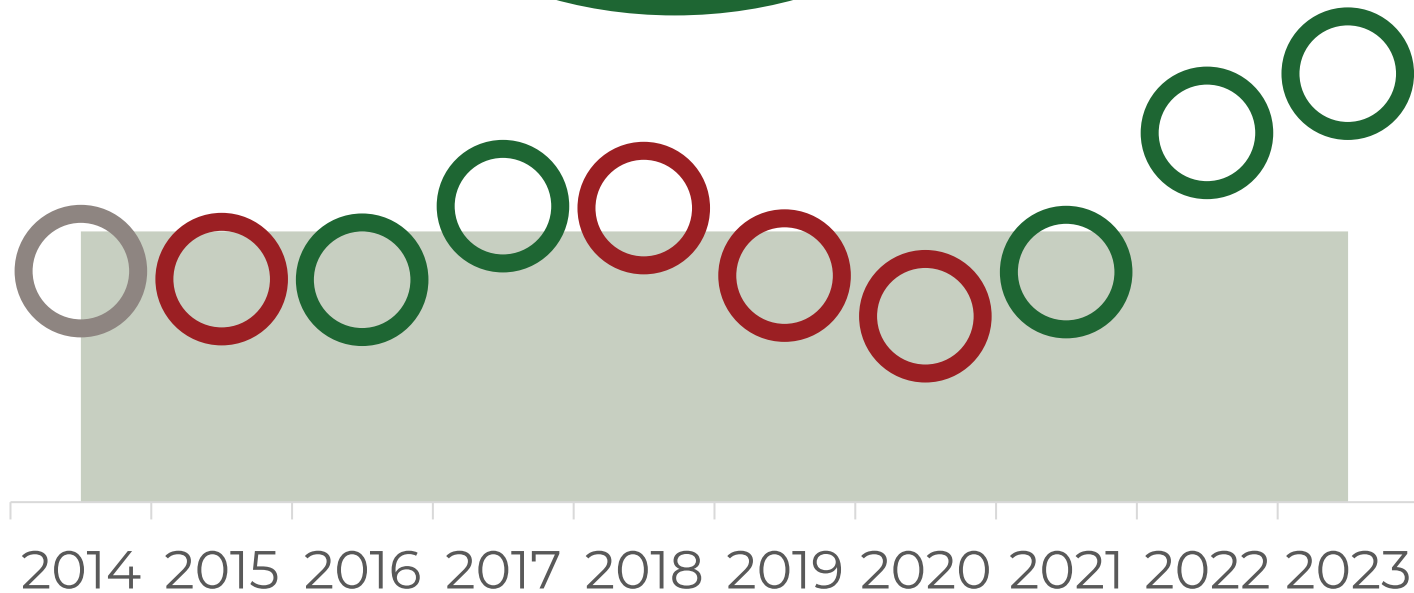
 Growth
 Decline

Rolling 12 Months to end June



All Combines

1,288
↑16%

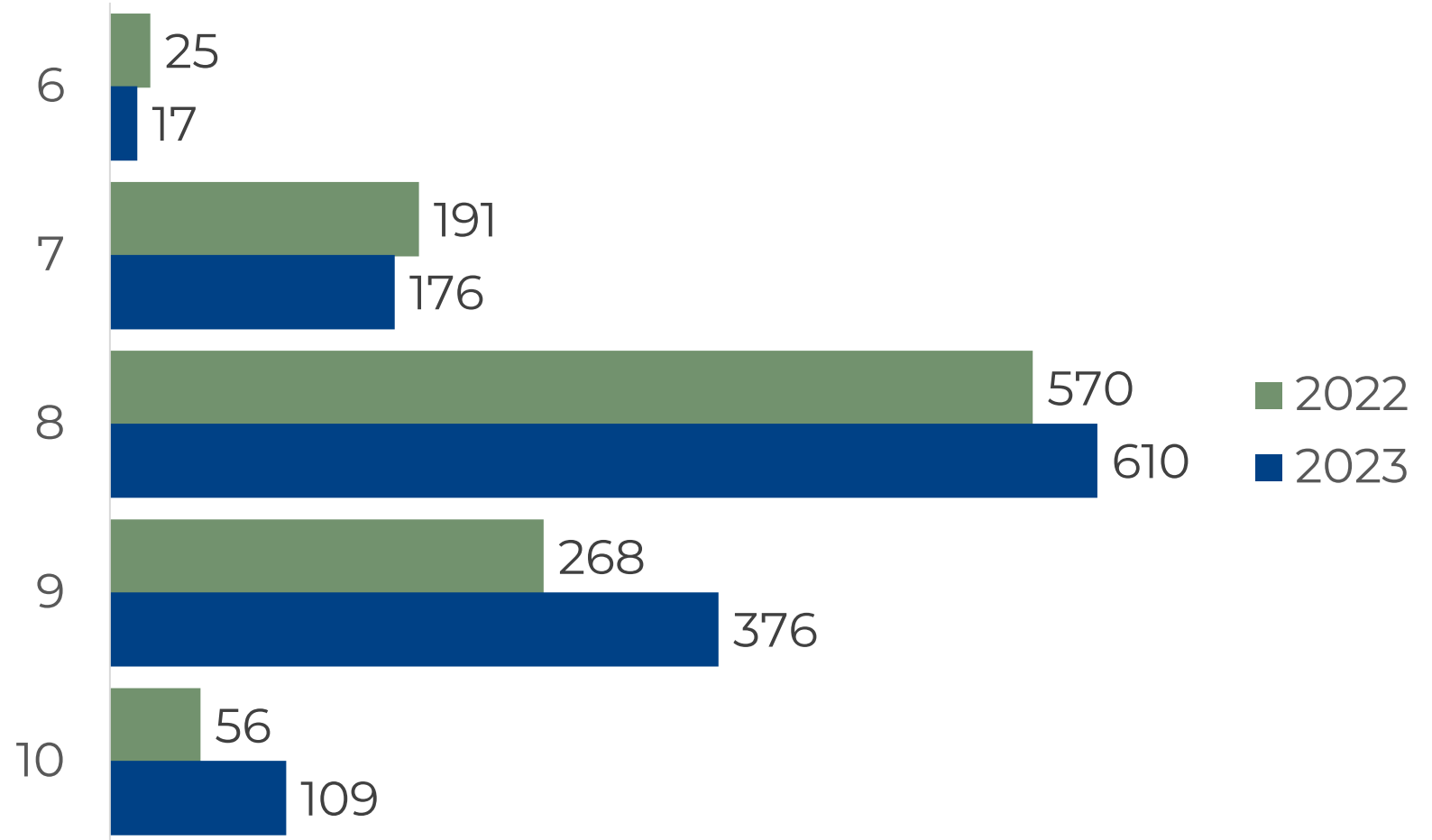


Growth
Decline

Rolling 12 Months to end June



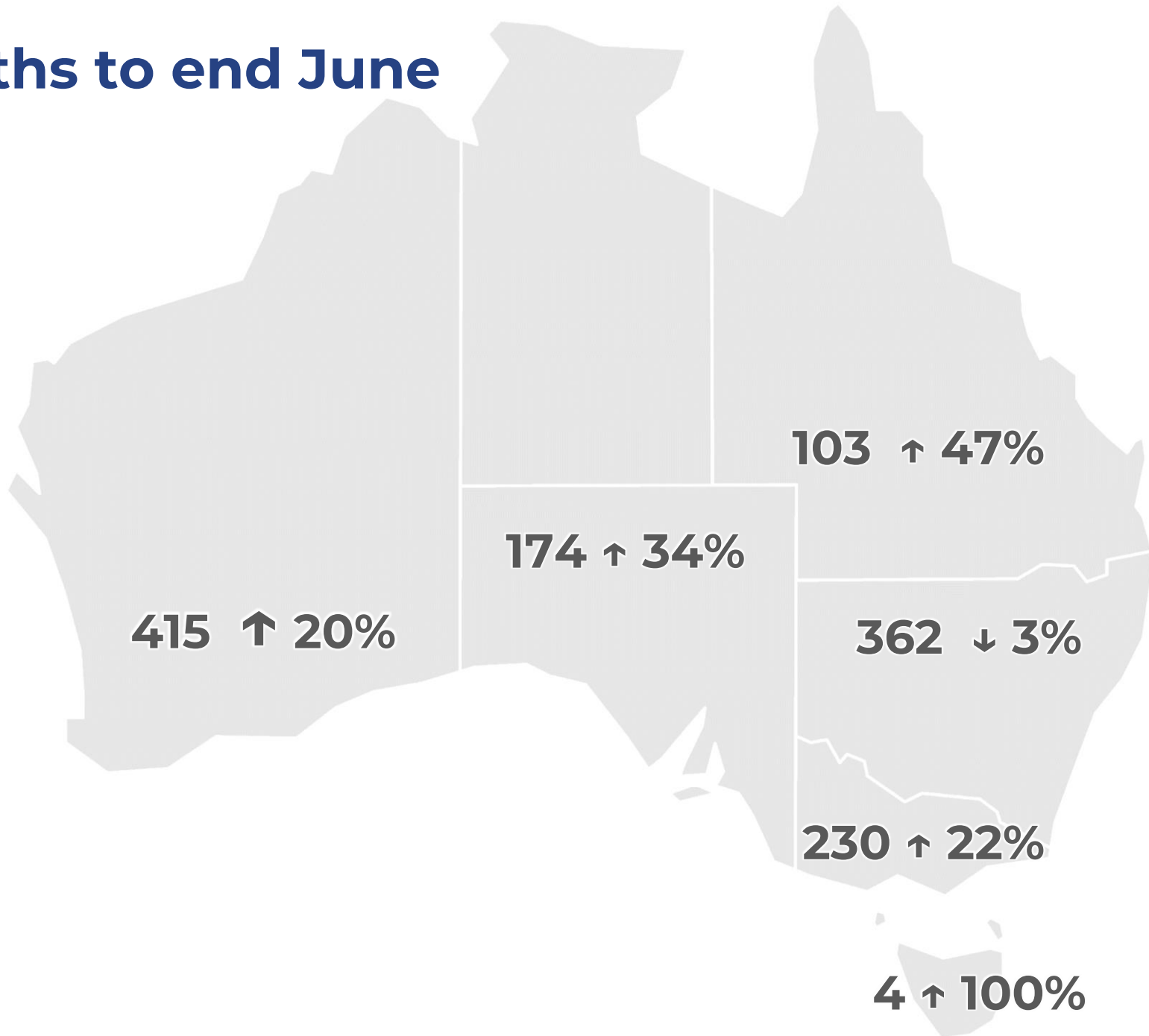
All Combines



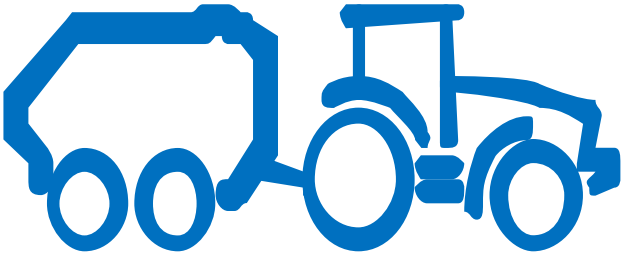
Rolling 12 Months to end June



All Combines

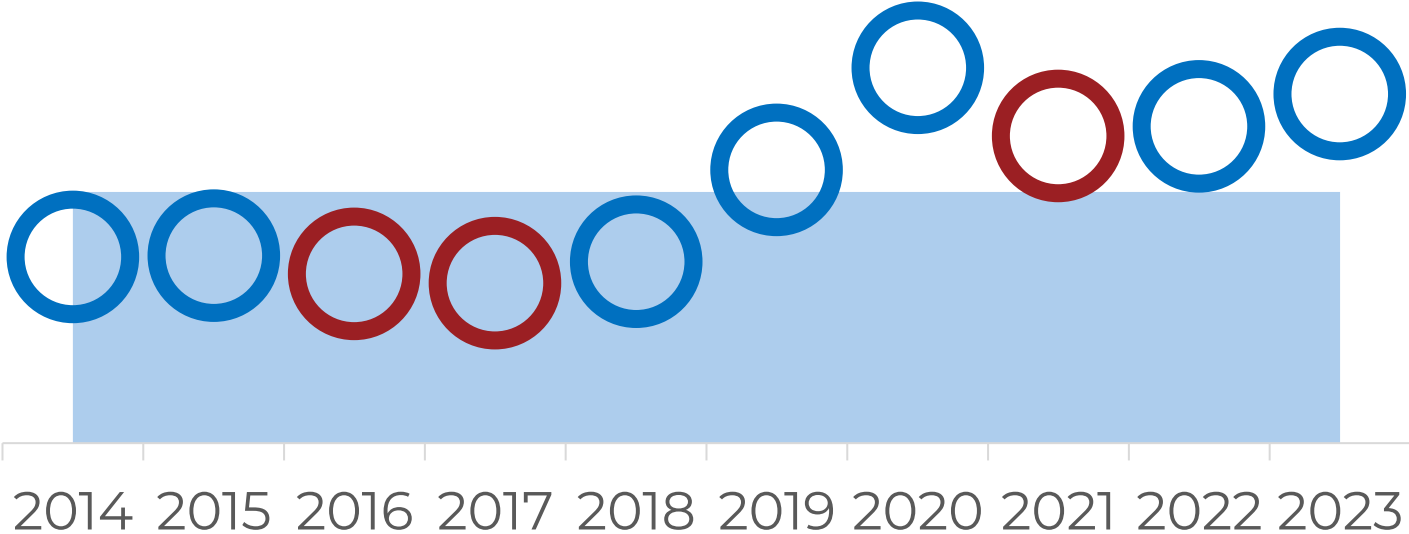


YTD end June 2023



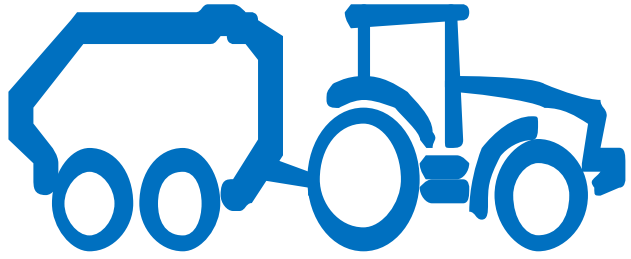
All Balers

225
↑10%



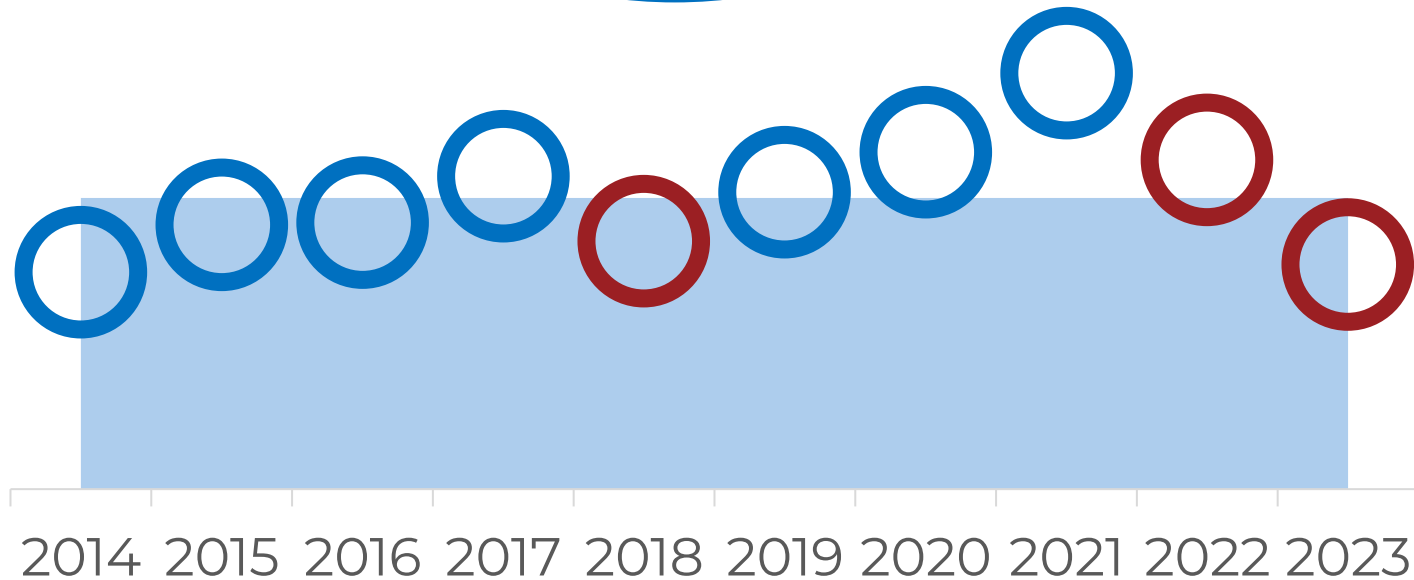
■ Growth
■ Decline

Rolling 12 Months to end June



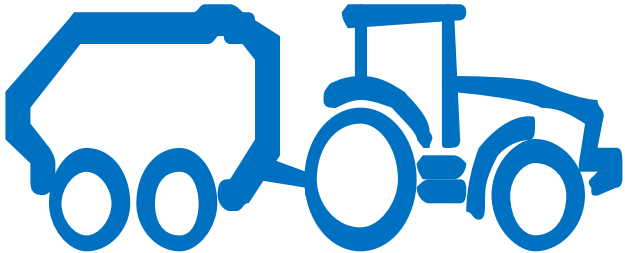
All Balers

675
↓ 32%

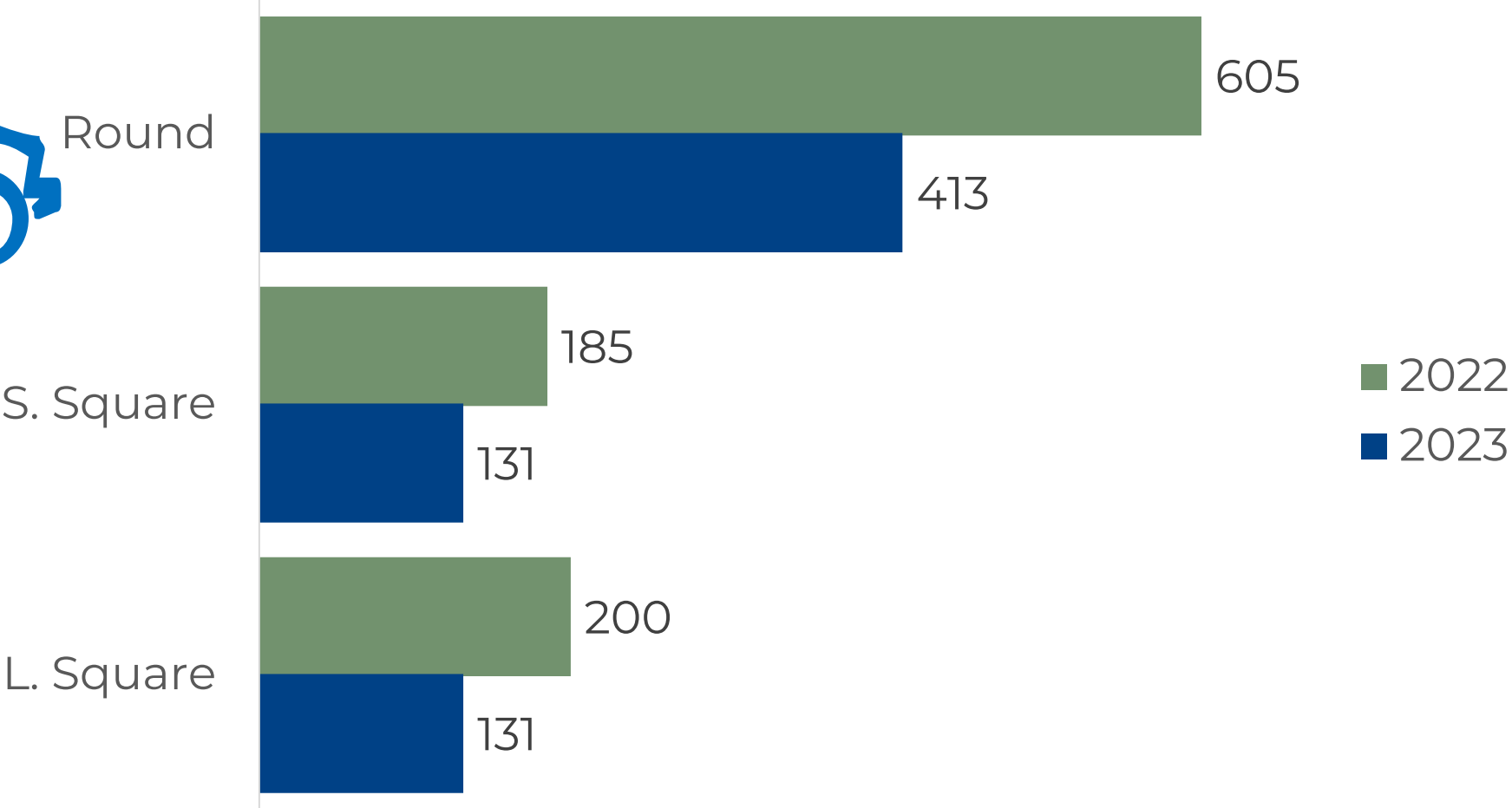


 Growth
 Decline

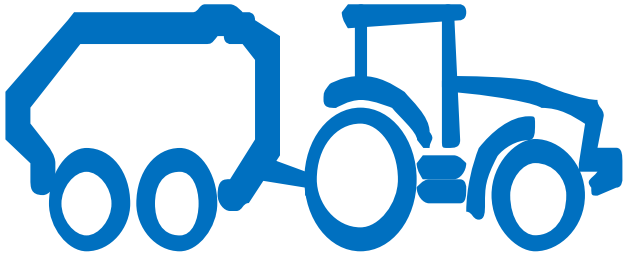
Rolling 12 Months to end June



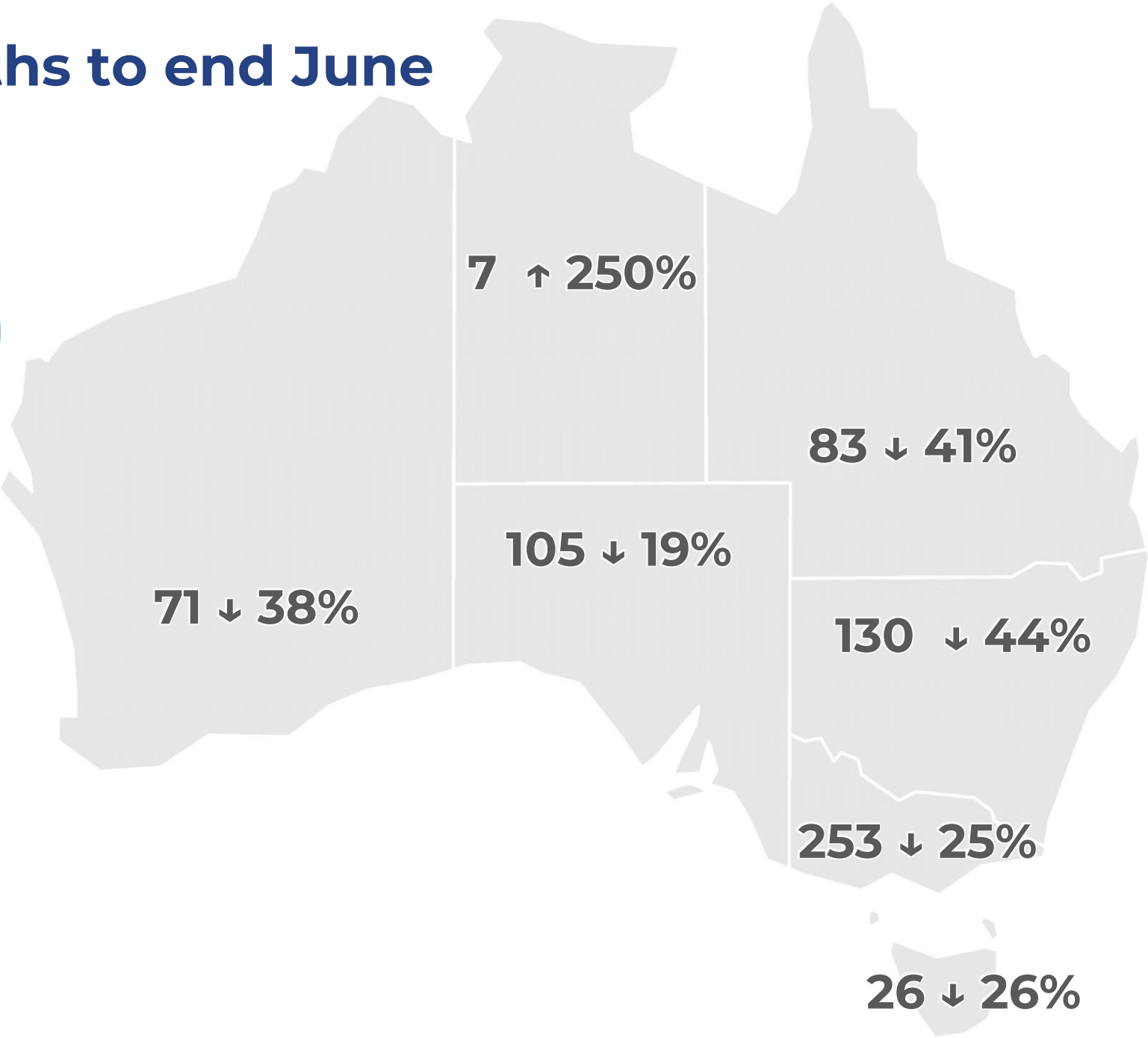
All Balers



Rolling 12 Months to end June



All Balers



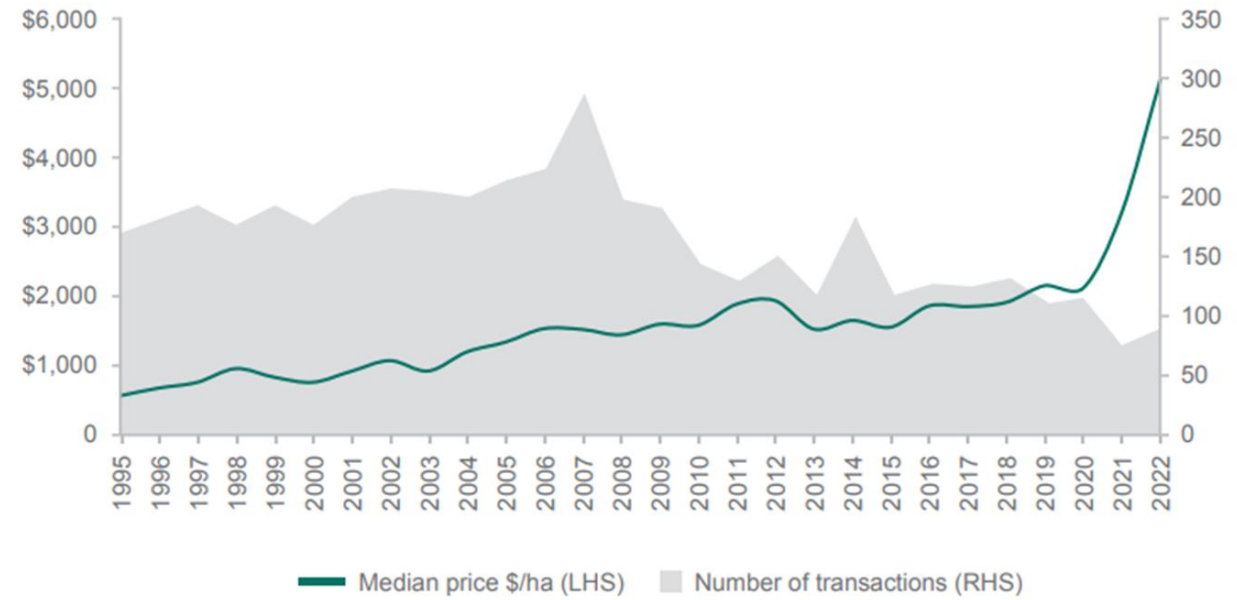
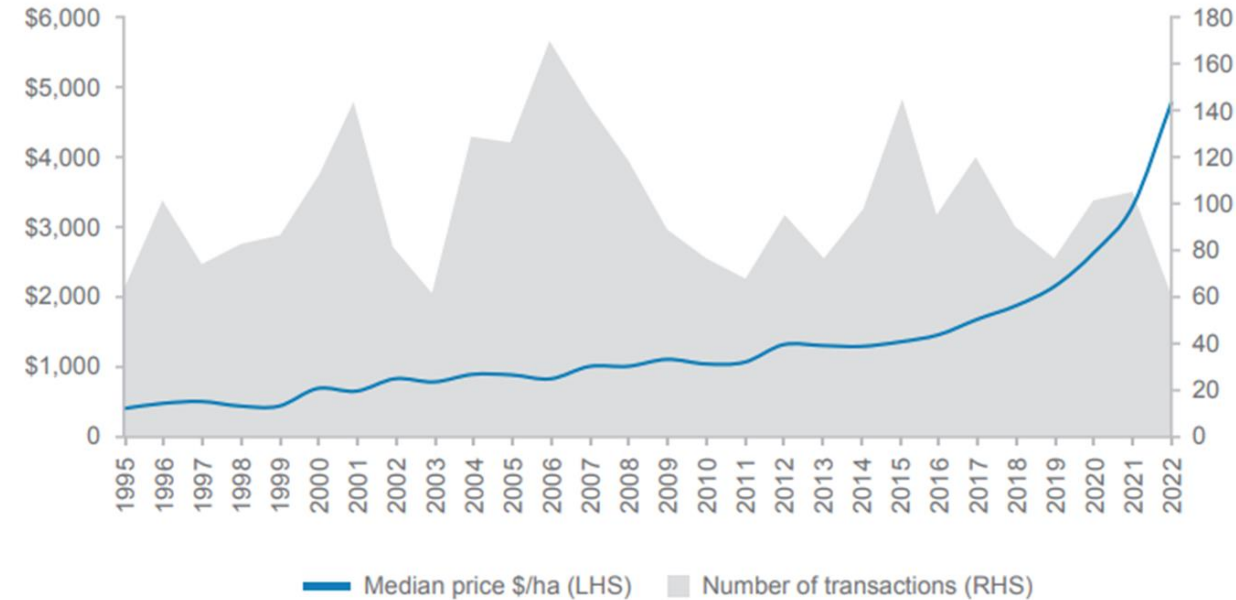
Distribution Network

	2009	2022 (May)	2023 (June)	YoY % change
Single Business Outlets	457	269	256	↓5%
Group Business Outlets	300	394	408	↑4%
Total Outlets	757	663	664	↑0.2%
Group Businesses	98	96	88	↓8%
Total Businesses	555	365	344	↓6%

Land Prices – Vic Mallee, WA central wheatbelt

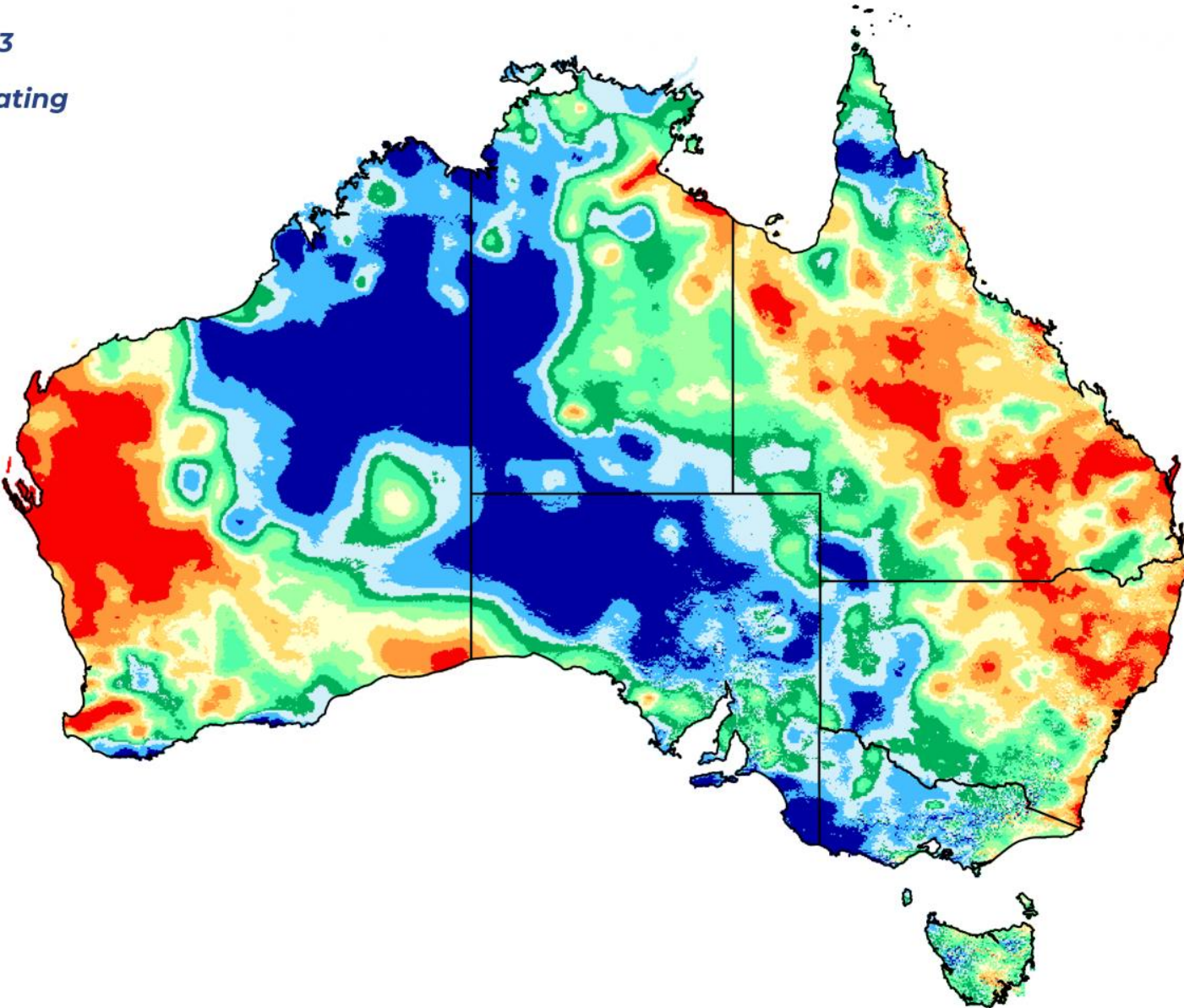
Vic Mallee : 165% increase in 5 years

WA : 168% increase in 5 years



Seasonal conditions

April to June 2023
5 Km Grid
Rainfall Decile Rating

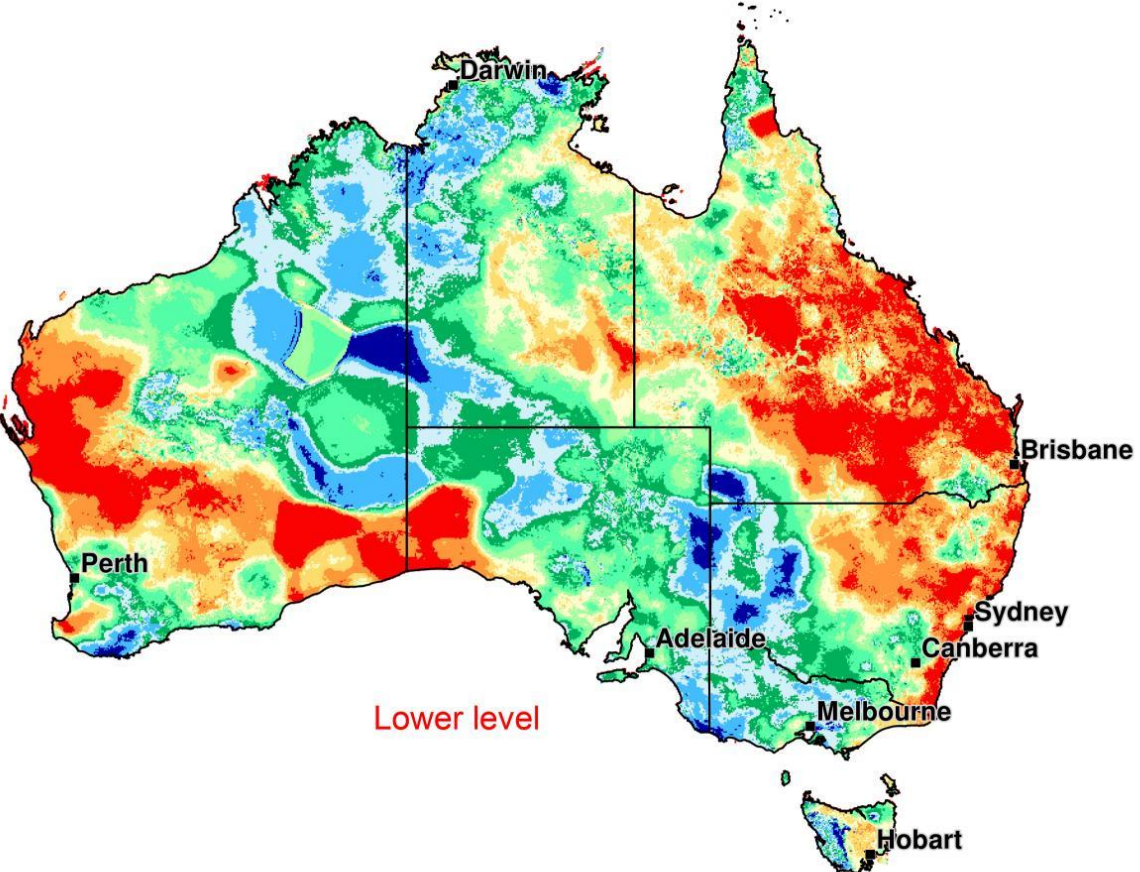
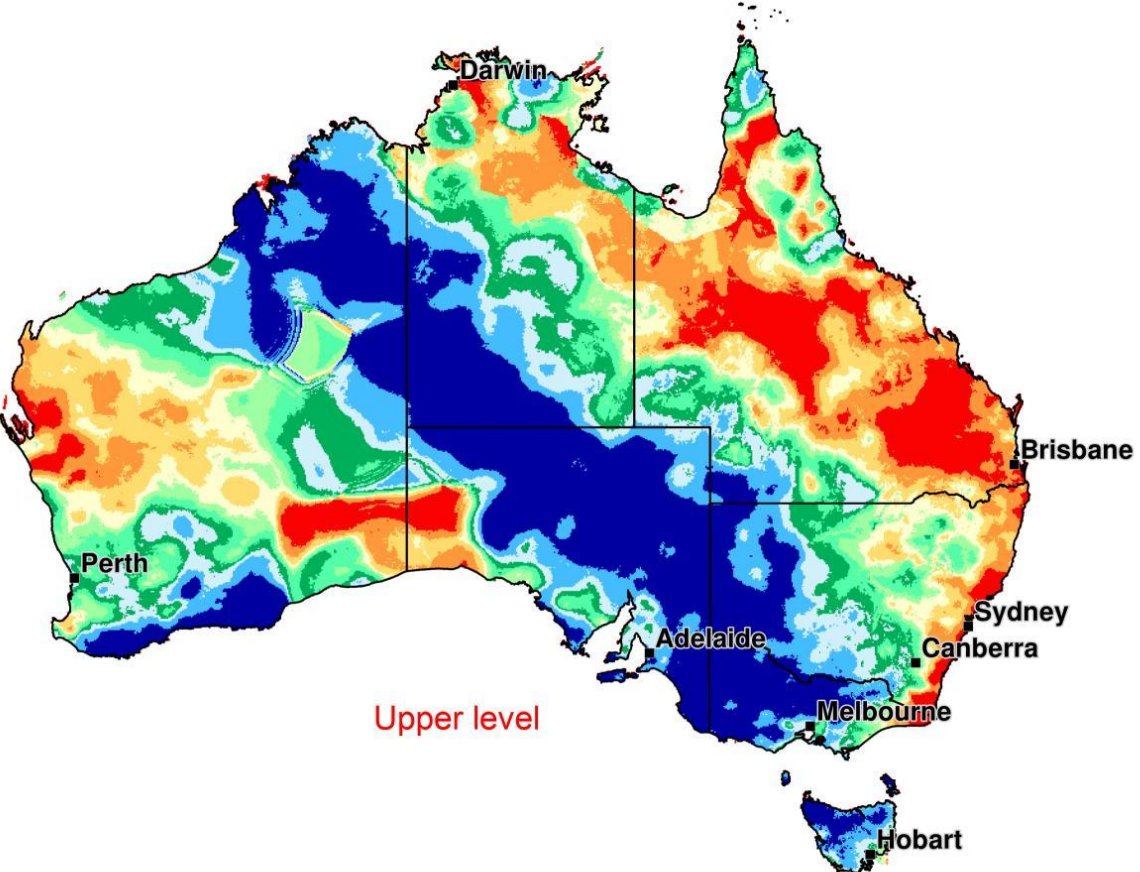


State Borders

Rainfall Source: BOM / Kynetec

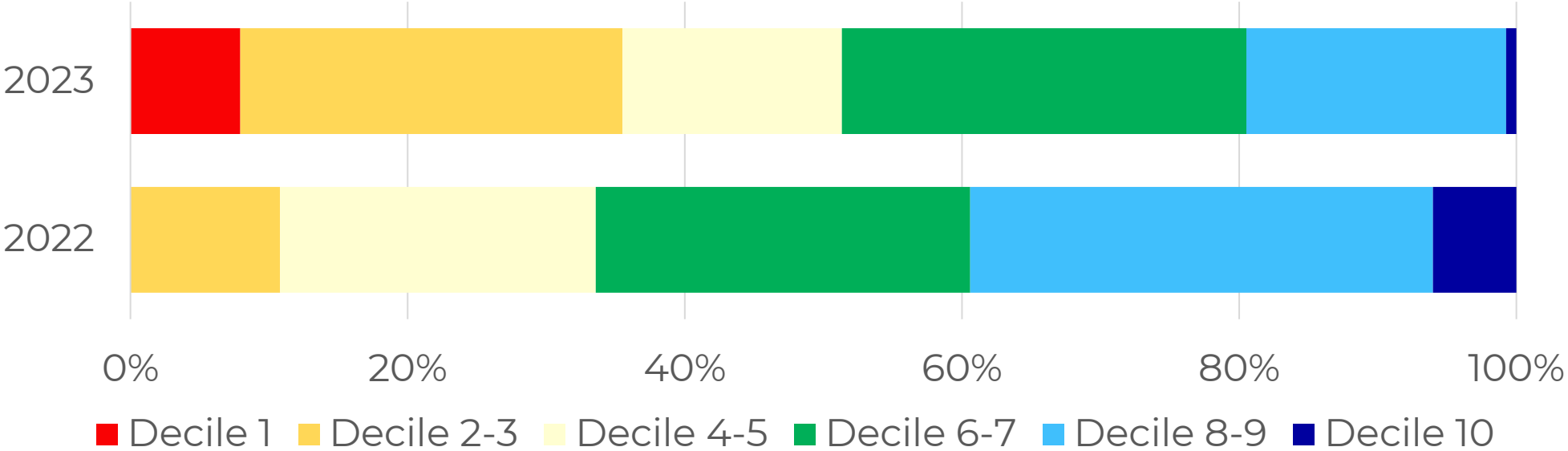


Seasonal conditions

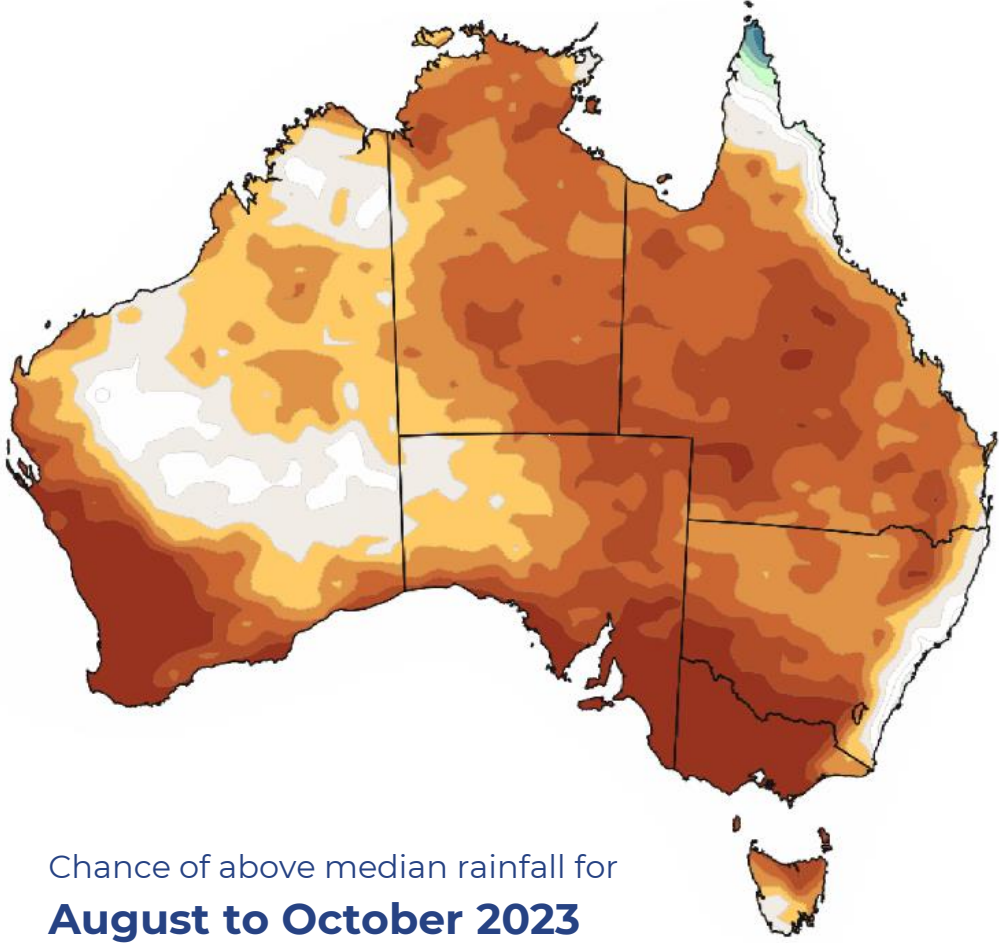
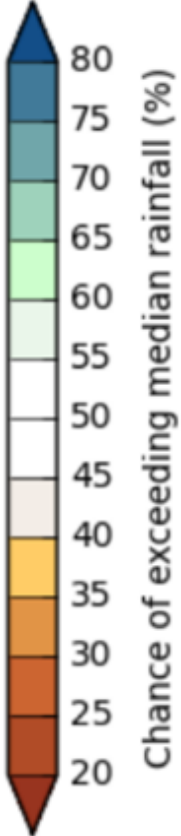
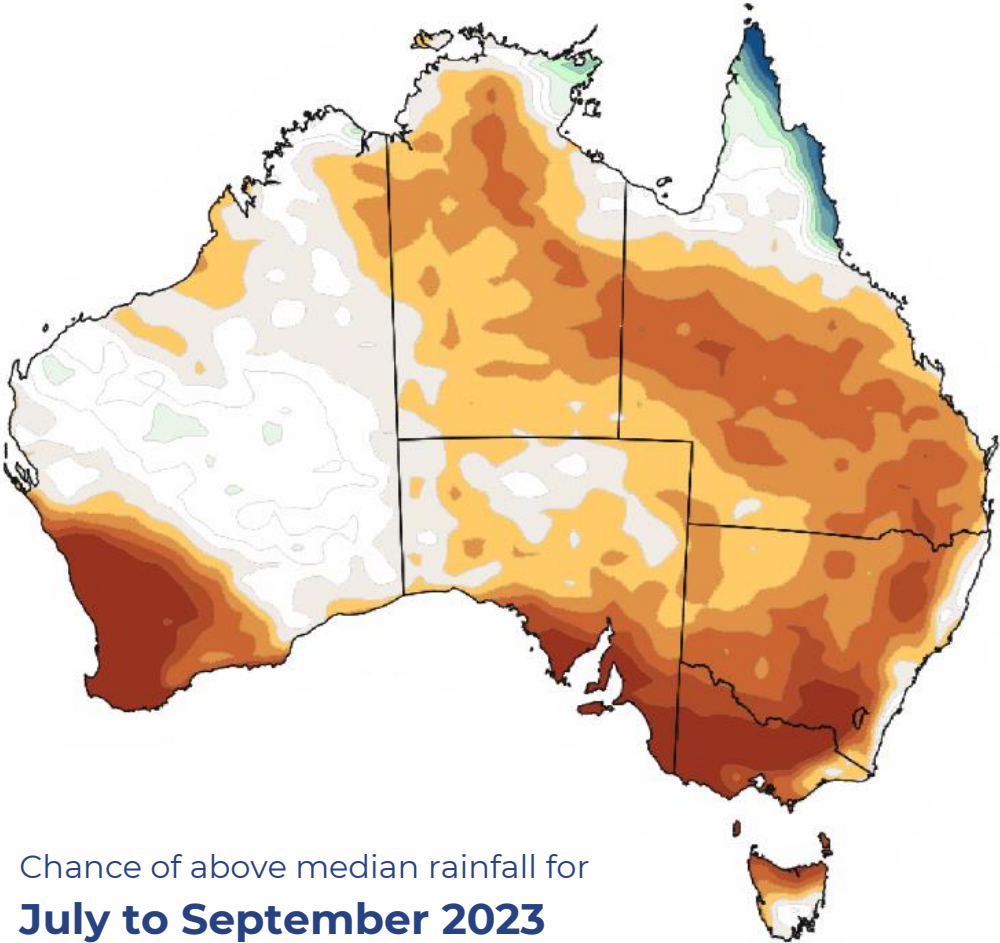


National % of Winter Crop Hectares by GSR Rating

April to June 2023



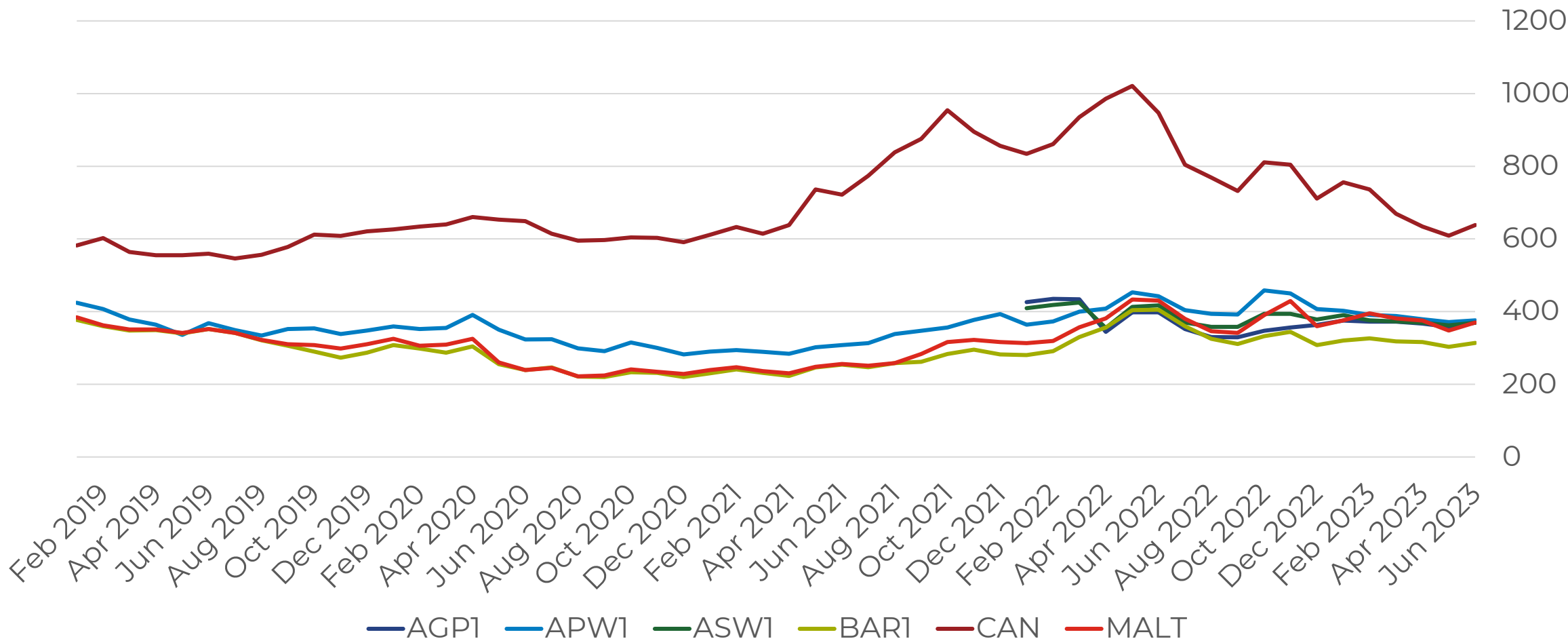
Seasonal conditions



Chance of above median rainfall for **July to September 2023**

Chance of above median rainfall for **August to October 2023**

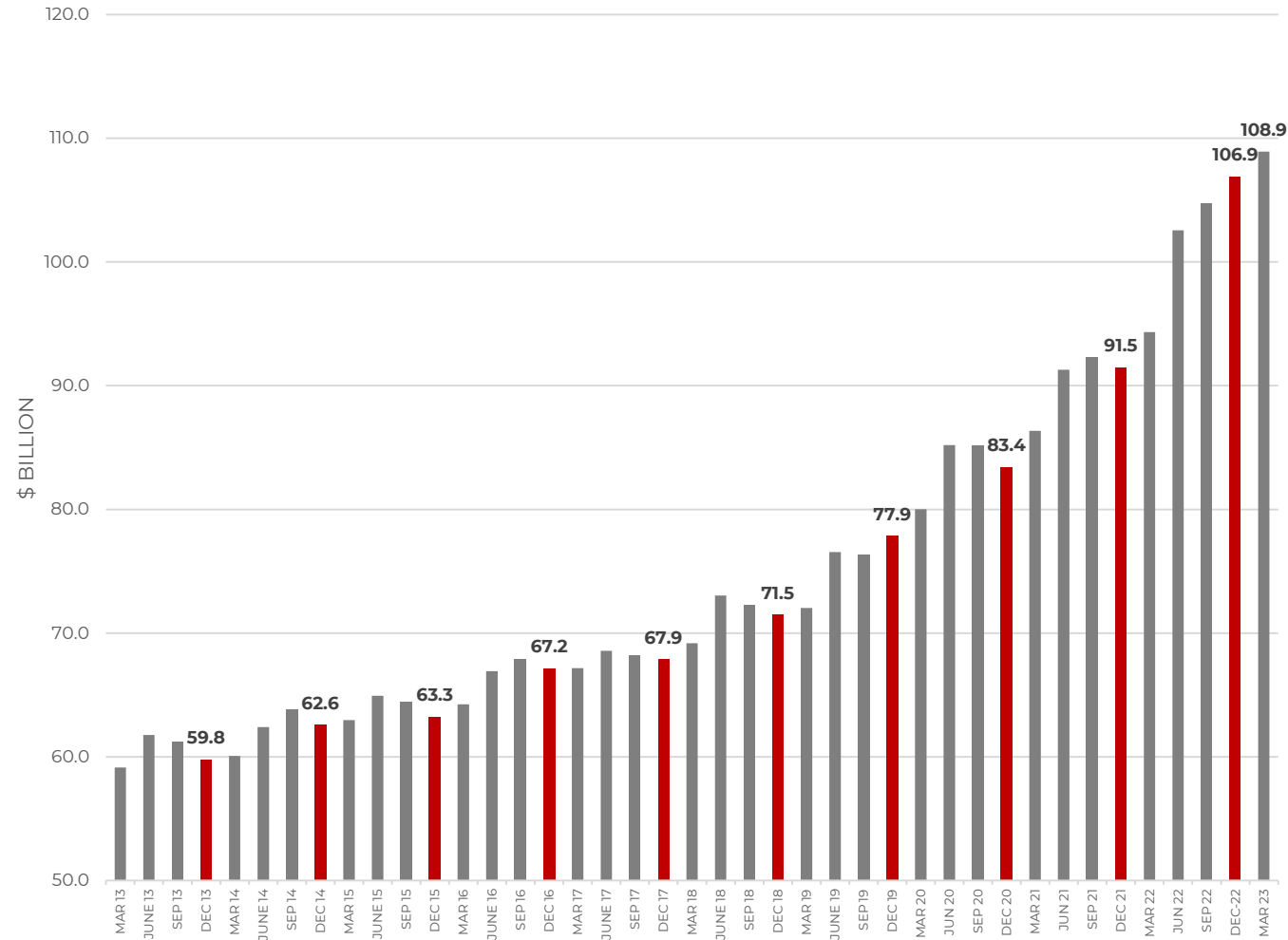
Geelong Monthly Average Grain Prices Five Years



Season Finish

		Decile 3		Average		Decile 7	
CROP	HECTARES	DECILE 3 TONNES	YIELD T/HA	DECILE 5 TONNES	YIELD T/HA	DECILE 7 TONNES	YIELD T/HA
Wheat	12,835,400	19,473,048	1.52	24,134,190	1.88	25,550,039	1.99
Barley	4,290,000	7,174,952	1.67	8,879,828	2.07	9,433,329	2.20
Canola	3,489,000	3,688,247	1.06	4,528,033	1.30	4,811,293	1.38

Bank Lending to Agriculture



2022

Interest:\$7.5bn

Revenue:\$79bn

Interest as a proportion of revenue:10%

2020

Interest:\$2.5bn

Revenue:\$67bn

Interest as a proportion of revenue:4%

Business Barometer Survey





For more information, please contact:



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