



2011 Agriculture Equipment Outlook

A Market Intelligence Product

From the Association of Equipment Manufacturers

SURVEY METHODS

This report includes member responses for U.S., Canadian, and Rest of World markets. The results are based on survey responses from member companies. Forecasts represent the average of responses from member companies in each product line. Member companies responded only to questions about the specific products they manufacture or market. Responses represent member companies' forecast for the industry as a whole, rather than for their particular companies.

The percentage figures shown above each chart are the industry average forecasts for sales in the particular product categories.

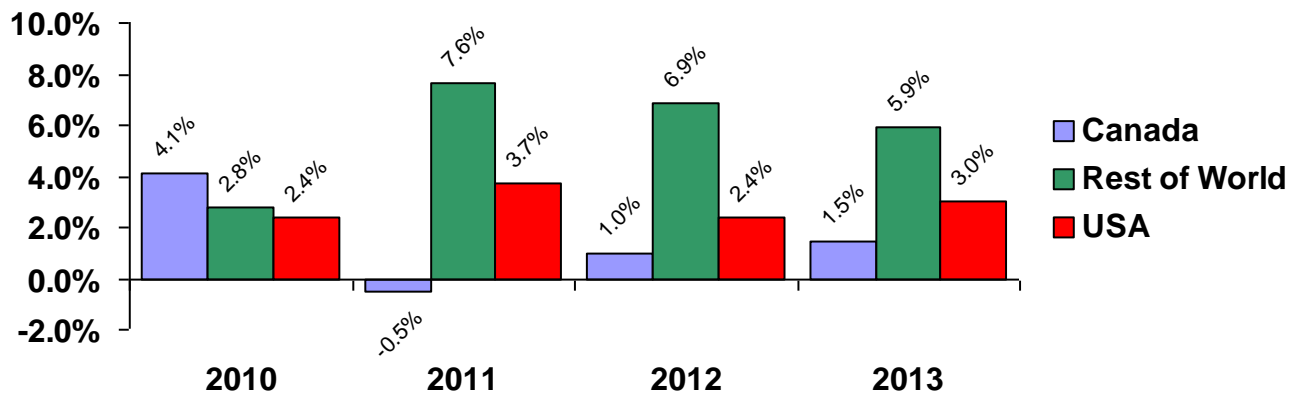
ABOUT AEM

The Association of Equipment Manufacturers (AEM) is the North American based international trade group providing innovative business development resources for companies that manufacture equipment, products and services used worldwide in the general construction, agricultural, forestry, mining and utility fields.

Association services include product safety and technical support, equipment statistics, market trends data, government representation, international marketing support, trade shows, online strategic information services, education and training programs and jobsite safety/educational publications and videos.

Sector Detail For Agriculture

Average By Region





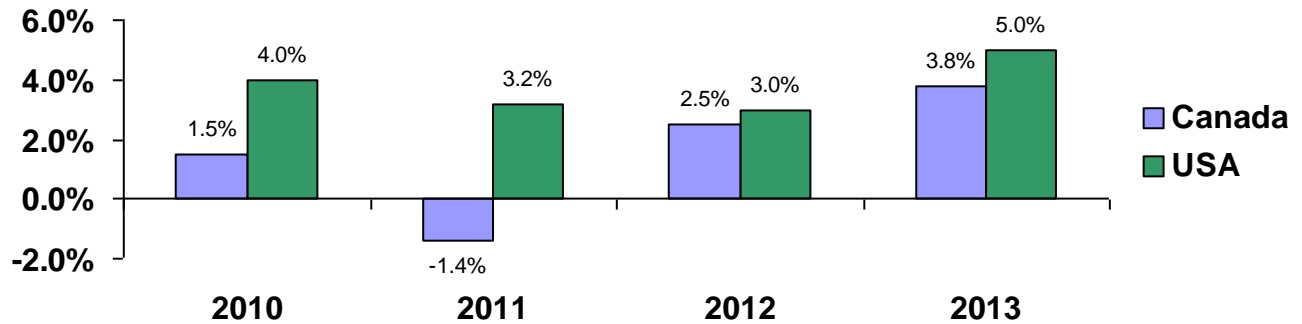
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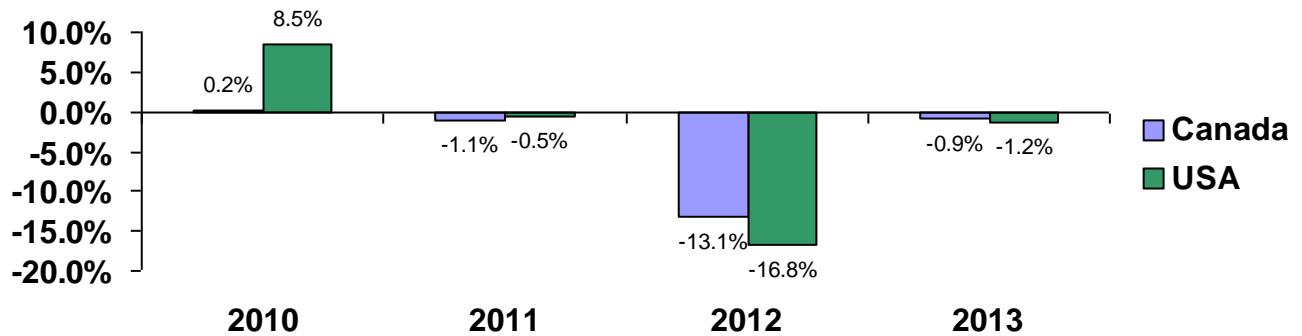
Agriculture Equipment Product-Level Detail For 2 Wheel Drive Tractors <40HP

Average By Region



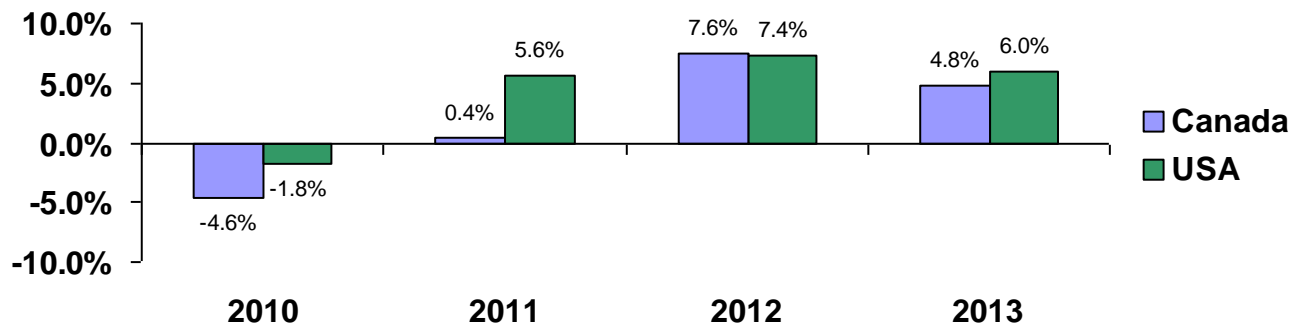
Agriculture Equipment Product-Level Detail For 2 Wheel Drive Tractors 100 HP+

Average By Region



Agriculture Equipment Product-Level Detail For 2 Wheel Drive Tractors 40-100 HP

Average By Region





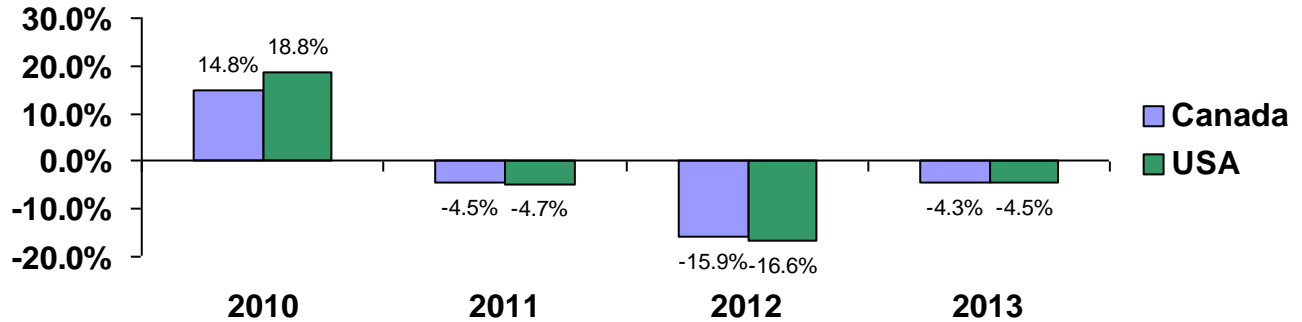
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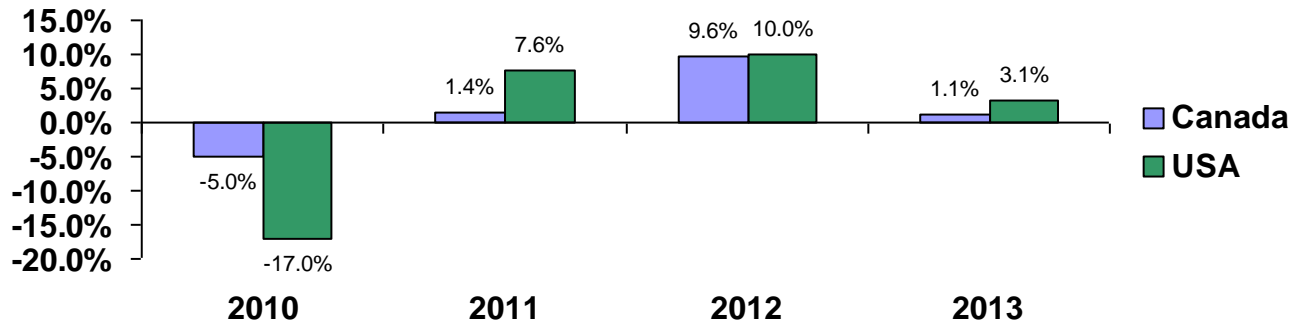
Agriculture Equipment Product-Level Detail For 4 Wheel Drive Tractors (all sizes)

Average By Region



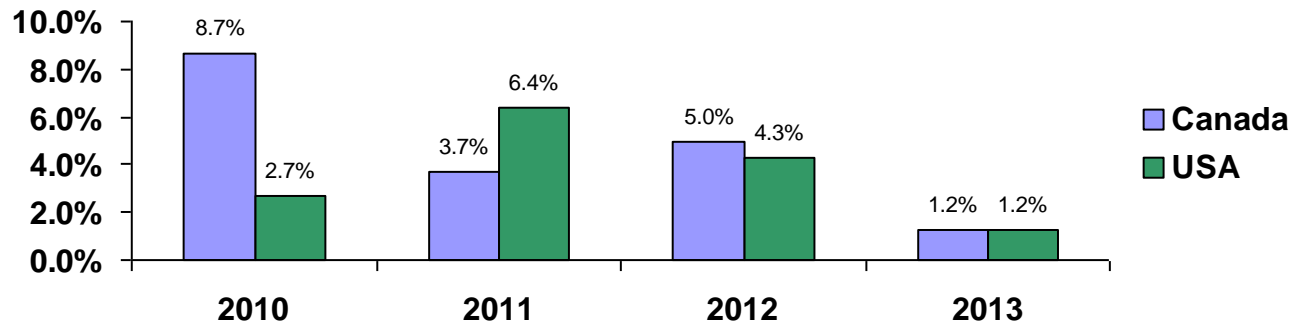
Agriculture Equipment Product-Level Detail For Balers (Rectangular)

Average By Region



Agriculture Equipment Product-Level Detail For Balers (Round)

Average By Region





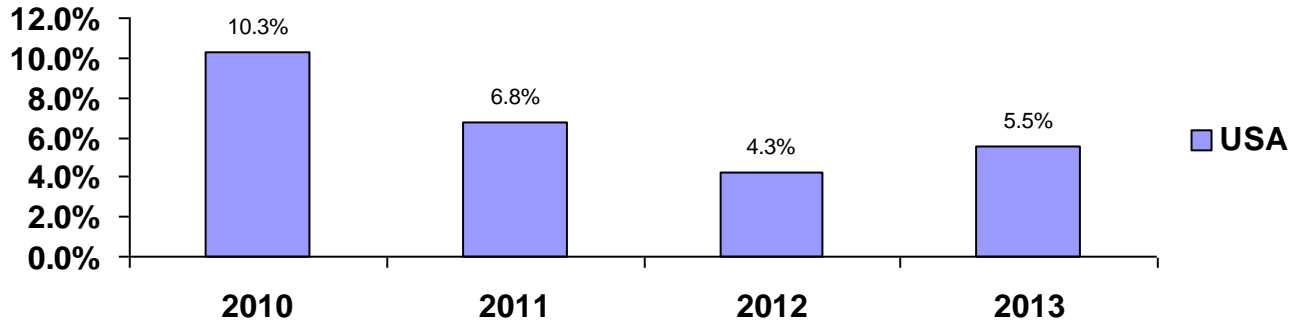
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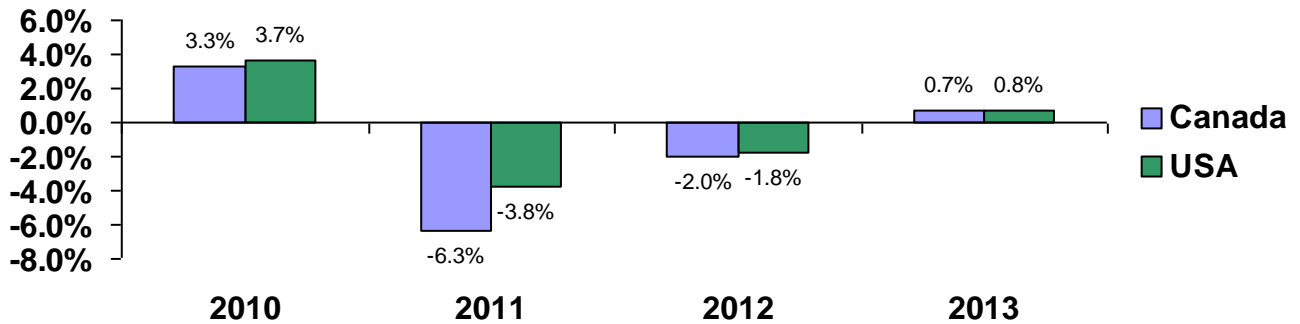
Agriculture Equipment Product-Level Detail For Box Scrapers

Average By Region



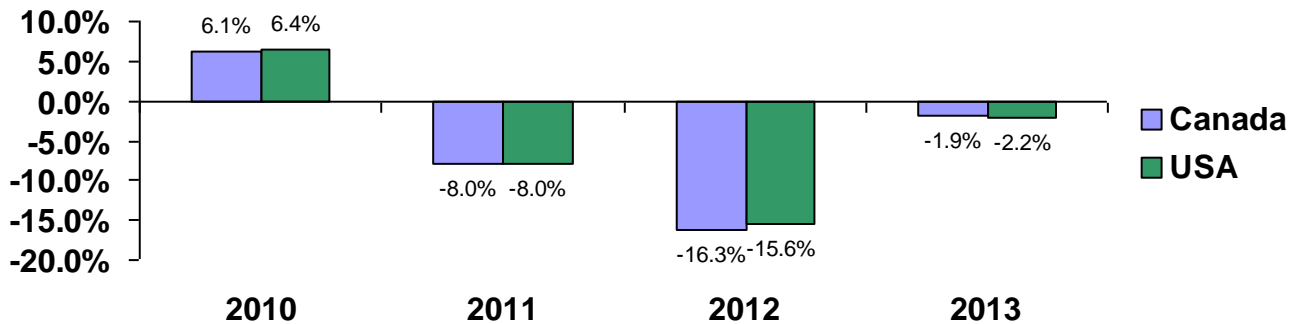
Agriculture Equipment Product-Level Detail For Chisel Plows (deep tillage, chisel, p

Average By Region



Agriculture Equipment Product-Level Detail For Combines (Self-Propelled)

Average By Region





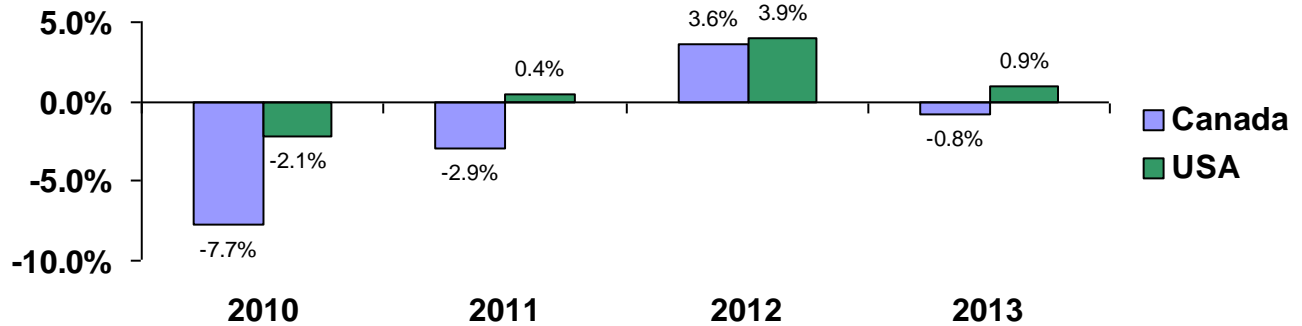
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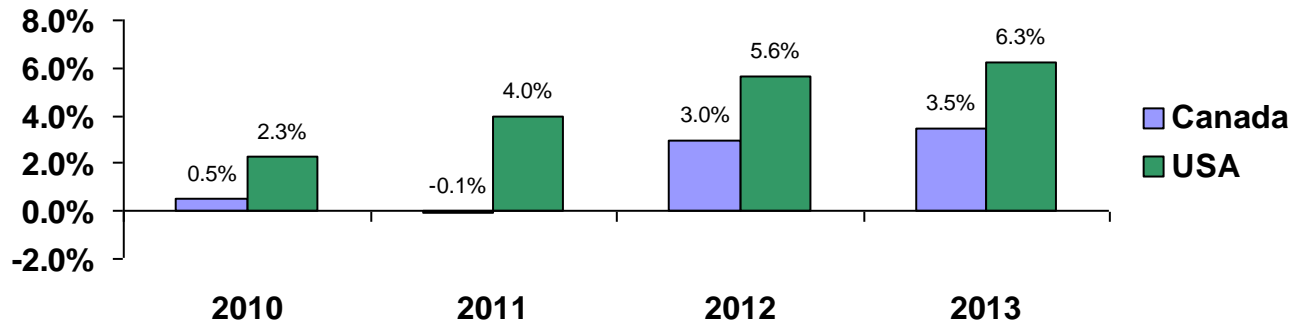
Agriculture Equipment Product-Level Detail For Disk Harrows (all)

Average By Region



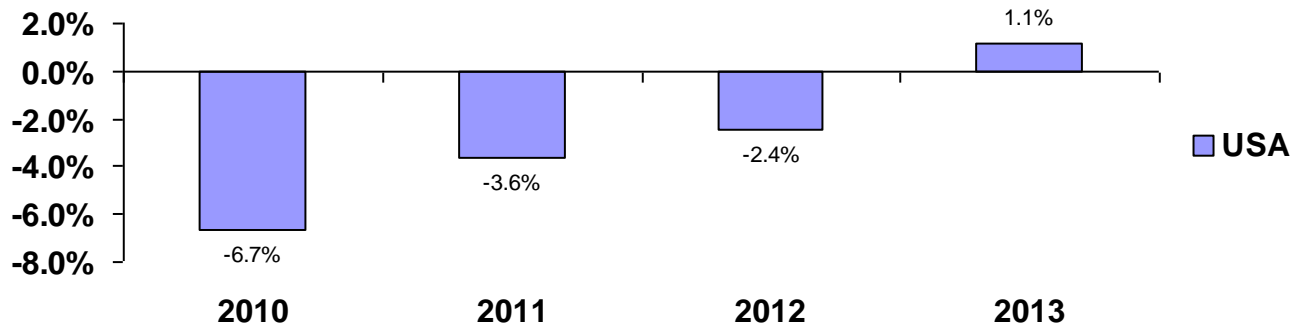
Agriculture Equipment Product-Level Detail For Farm Loaders (all sizes)

Average By Region



Agriculture Equipment Product-Level Detail For Field Cultivators (all)

Average By Region





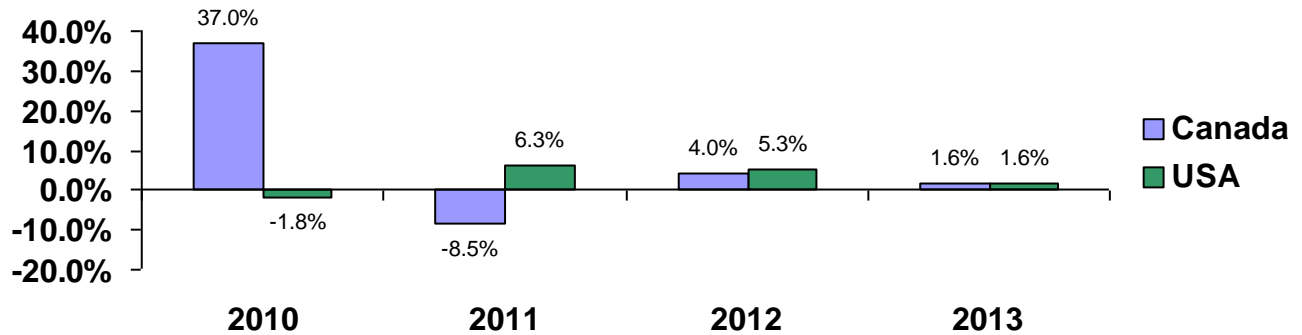
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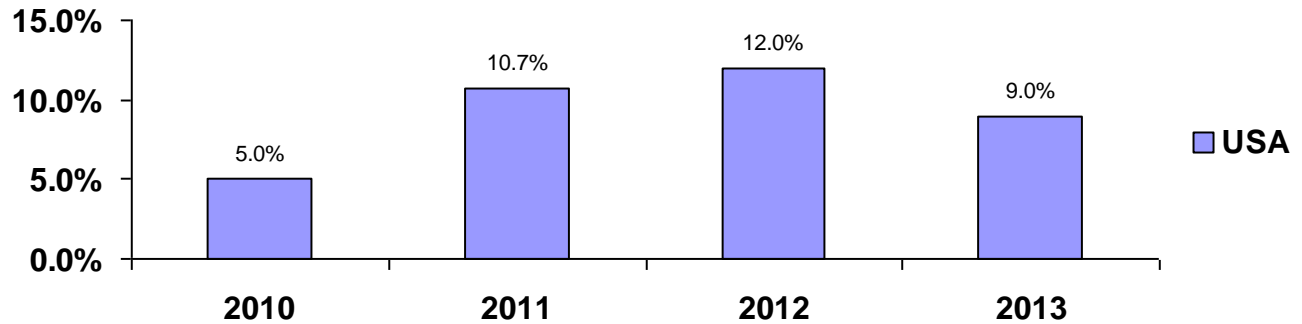
Agriculture Equipment Product-Level Detail For Forage Harvestors (pull & self prop)

Average By Region



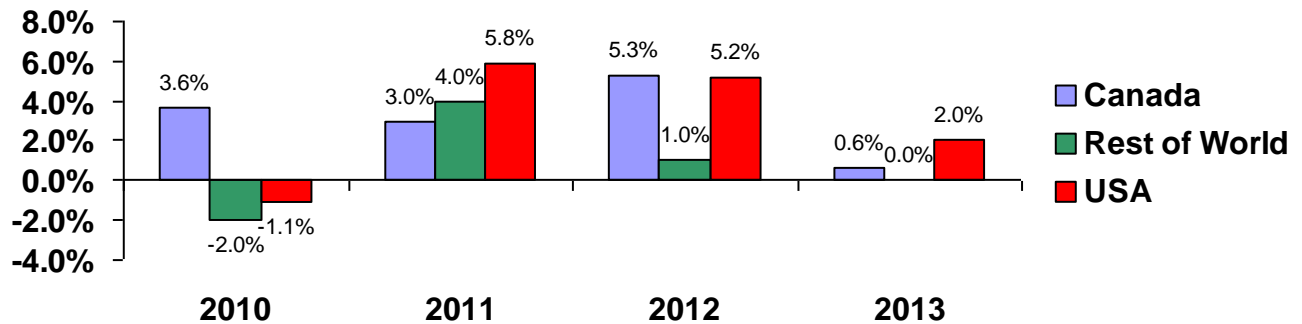
Agriculture Equipment Product-Level Detail For Milking Parlors

Average By Region



Agriculture Equipment Product-Level Detail For Mower Conditioners

Average By Region





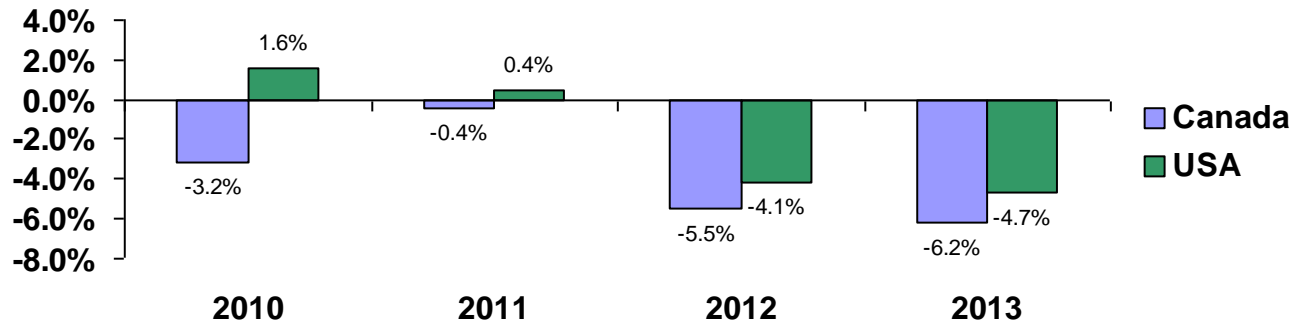
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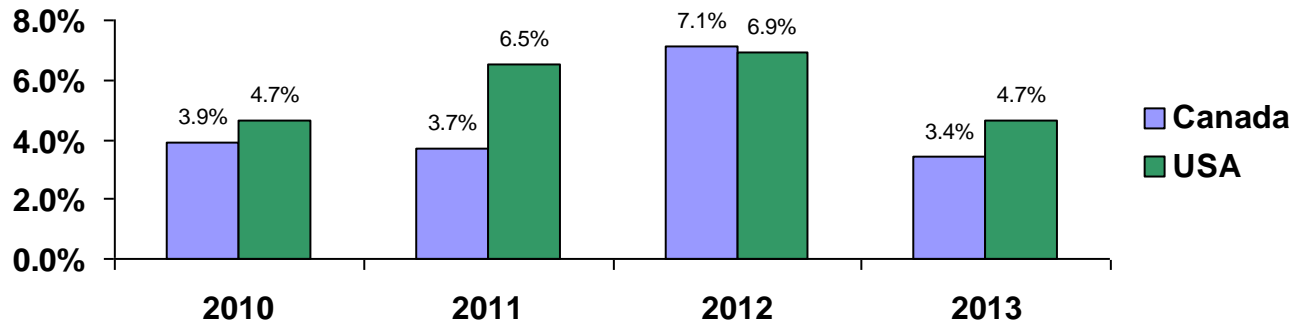
Agriculture Equipment Product-Level Detail For Planters (all)

Average By Region



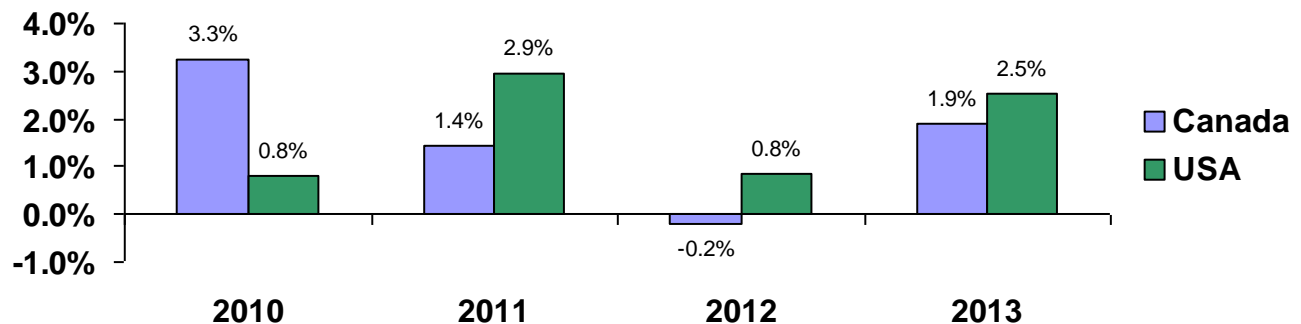
Agriculture Equipment Product-Level Detail For Rotary Cutters

Average By Region



Agriculture Equipment Product-Level Detail For Self-Propelled Sprayers

Average By Region





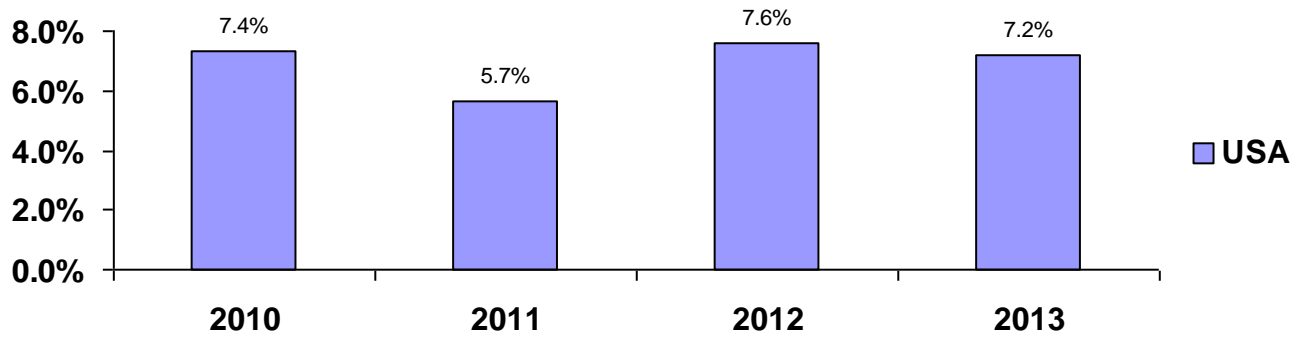
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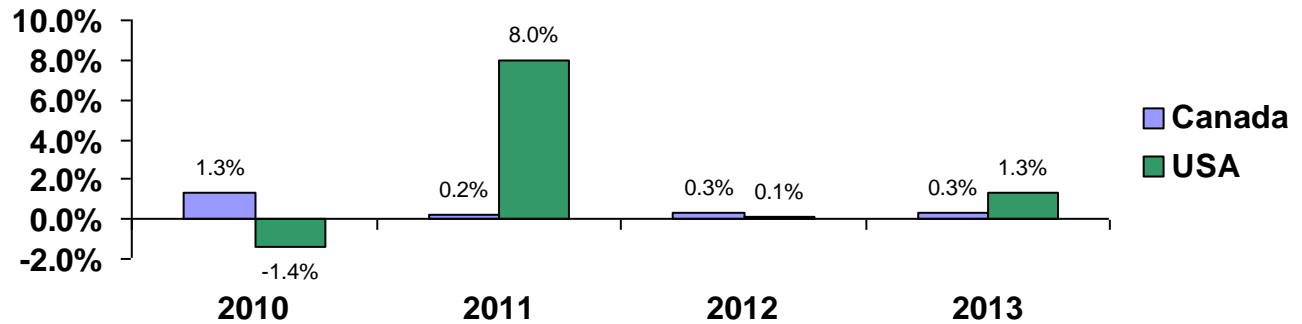
Agriculture Equipment Product-Level Detail For Tractor Backhoes

Average By Region



Agriculture Equipment Product-Level Detail For Windrowers & Swathers (pull & self)

Average By Region





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Factors Affecting Future Agriculture Equipment Business

Companies were asked to rank how the following factors affected their sales in 2010, and how they would affect their sales in 2011. 1 = a strong negative effect, 3 is no effect, 5 = a strong positive effect.

	2010				
	1	2	3	4	5
Weather		9.3%	37.2%	23.3%	2.3%
Consumer Confidence	16.3%	23.3%	14.0%	14.0%	4.7%
Credit Availability	14.0%	27.9%	14.0%	9.3%	7.0%
Dealer Changes	2.3%	11.6%	48.8%	9.3%	
Energy Costs	2.3%	18.6%	39.5%	9.3%	2.3%
Excess Industry Inventory		18.6%	41.9%	11.6%	
General Economy	14.0%	25.6%	16.3%	16.3%	
Increased Export Demand		4.7%	32.6%	27.9%	7.0%
Interest Rates	4.7%	7.0%	23.3%	25.6%	11.6%
Steel Prices	4.7%	34.9%	27.9%	4.7%	
Strength of the Dollar	7.0%	20.9%	27.9%	16.3%	
Commodity Prices	2.3%	7.0%	20.9%	27.9%	14.0%
Tier 4	4.7%	9.3%	34.9%	11.6%	7.0%

	2011				
	1	2	3	4	5
Weather			48.8%	16.3%	4.7%
Consumer Confidence	4.7%	14.0%	18.6%	27.9%	7.0%
Credit Availability	4.7%	18.6%	27.9%	18.6%	2.3%
Dealer Changes		11.6%	41.9%	18.6%	
Energy Costs	2.3%	16.3%	44.2%	7.0%	2.3%
Excess Industry Inventory		11.6%	51.2%	4.7%	4.7%
General Economy	4.7%	16.3%	23.3%	25.6%	2.3%
Increased Export Demand		2.3%	32.6%	34.9%	2.3%
Interest Rates	2.3%	7.0%	32.6%	20.9%	9.3%
Steel Prices	7.0%	25.6%	30.2%	7.0%	2.3%
Strength of the Dollar	7.0%	18.6%	30.2%	14.0%	2.3%
Tier 4	2.3%	16.3%	34.9%	7.0%	7.0%
Commodity Prices		9.3%	30.2%	20.9%	11.6%