



SOUTHERN  
**AFRICA EUROPE**  
CEO DIALOGUE



The European House  
**Ambrosetti**

# SOUTHERN AFRICA EUROPE CEO DIALOGUE

7<sup>th</sup> Edition

**Johannesburg** – The Capital On The Park & **Virtual Platform**  
**November 26-27, 2020**

BUILDING AN EXCLUSIVE, INFLUENTIAL COMMUNITY OF LEADERS FOR GROWING  
THEIR ENTERPRISES, THEIR COUNTRIES, AND THEIR CONTINENTS

## PRESENTATION BY FEDERICO BELLOTTO



FEDERICO BELLOTTO

BUSINESS DIRECTOR – SOUTHERN AFRICA



# OUR COMPANY: GROUP STRUCTURE



& **Borsa Italiana**

CNH Industrial's common shares are listed on the New York and Milan Stock Exchange

FINANCIAL SERVICES



POWERTRAIN



AGRICULTURE



CONSTRUCTION



COMMERCIAL & SPECIALTY VEHICLES



# CNH INDUSTRIAL - KEY FIGURES



12

BRANDS



63,499

EMPLOYEES



67

PLANTS



56

R&D CENTERS



\$28.1 BILLION

CONSOLIDATED REVENUES



\$1.0 BILLION

R&D SPENDING



180

NATIONAL MARKETS



Note: all figures provided in this presentation are on a US GAAP \$ basis and updated at December 31, 2019, unless otherwise indicated



# SOUTH AFRICA: A KEY MARKET



## Strong Presence

in HIGH HP and SPECIALTY TRACTOR MARKET and in GRAPE HARVESTERS



## Only Manufacturer

SUPPLYING COMMERCIAL VEHICLES FROM 3.5 TONS UP TO 250 TONS GCW



COMMERCIAL & SPECIALTY VEHICLES







+ 250 EMPLOYEES



1 PLANT



1 R&D CENTER

-  Manufacturing site
-  R&D Center
-  \* JV (including unconsolidated joint venture)
-  Parts Distribution Center

Facts and figures as of Dec. 31, 2019

# SOUTH AFRICA



2020 KEY MARKET



**New Holland is a world-leading agricultural equipment brand with over 125 years of experience** in supporting five generations of farmers across the globe. The brand is the partner that farmers and growers can rely on to provide **innovative, efficient, and sustainable farming solutions.**

New Holland offers every customer the broadest choice of easy-to-operate tractors, harvesters, foraging equipment, balers, material handlers, sprayers, tillage, seeding and planting equipment complemented by advanced Precision Land Management solutions. It is open and responsive, ready to understand global customers' changing needs and on hand to **help farmers get the job done.**



[www.newholland.com](http://www.newholland.com)

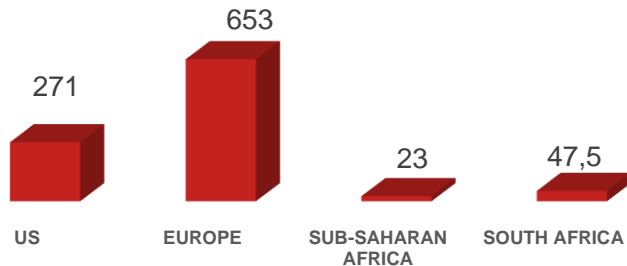
# AGRICULTURE



# Agriculture & Macroeconomics - Africa

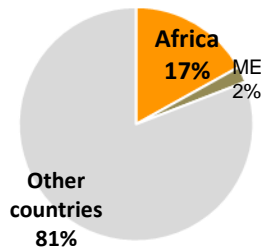
## A long-term opportunity for Ag business

Level of Farm Mechanization  
(Tractors/100 Sq. Km of Arable Land)



## Arable Land

% on Total World Arable Land



## SOUTH AFRICA - THE ROLE OF AGRICULTURE

South Africa is one of the largest agriculture country

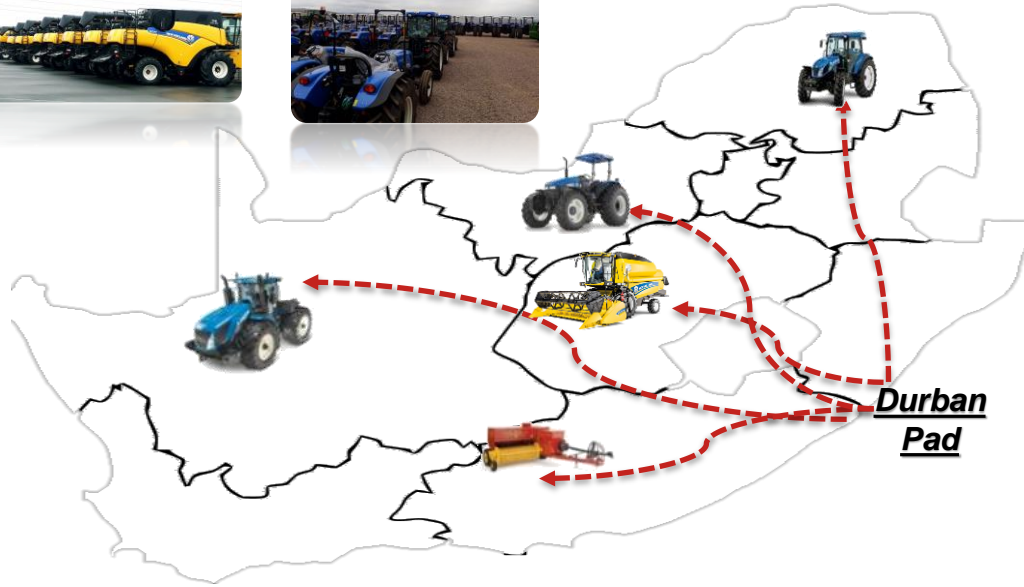
Wide range of crops

Sustainable agriculture with big commercial farms

Represents 35% of the total mechanization in Africa

# New Holland Agriculture Branch since 2017

- Continuous support from Branch in Johannesburg and Inventory Pad in Durban across Southern Africa since 2017



## 2020 with Covid-19 situation

- Lockdowns created problems in order to supply Farm machinery to dealers and farmers all around The world, but in SA minimal effects.
- **Total Industry of Agriculture Machinery in 2020 in SA is around 10% above 2019**
- As CNHI we managed to remain our strong position during the tough period with our strong Network in Southern Africa and our stock level was good enough to support the farmers



# DIGITALIZATION AND PRECISION FARMING

SoilXplorer with the real-time soil scanning system



XPower electro-herbicide for zero-chemical weed control



CropXplorer sensor for optimized N-balance



AGXTEND™ is CNH Industrial's leading platform for innovative technologies in breakthrough precision farming that are retrofittable to the Company's brands and third party machines.

zero-chemical weed control, real-time soil measurement systems, near-infrared and sensing systems, a biomass sensing package, and the Internet of Things to combine real-time weather sensor data.



Farmers can access a platform with a comprehensive suite of digital services to help them improve productivity



TILLAGE & SOIL PREPARATION



SEEDING



FERTILIZATION



WEED CONTROL



HARVEST



THANK YOU