Global and China Agricultural Machinery Industry Report, 2013-2014

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Since 2004, driven by agricultural machinery subsidies and other favorable policies, China's agricultural machinery industry has achieved rapid development, the gross output value of agricultural machinery exceeded RMB 300 billion, total power of agricultural machinery surpassed 1 billion kilowatts, and the integrated mechanization level of agricultural crops exceeded 50%, demonstrating that China has entered into a mechanized production-oriented period.

Tractors and harvesting machinery are the most important agricultural machinery products in China, with annual output of 2.25 million units and 1.114 million units in 2012 separately, far higher than those of other countries and regions. Currently, China's tractor product structure has shown significant differentiation: large and medium-sized tractors grow steadily, while small tractors decline gradually and even experienced a double-digit decrease in 2012.

Among China's three major crops, wheat has basically realized mechanization, while corn and rice lag far behind, especially the harvesting of corn and sowing of rice. In view of this, China has increased the subsidies and investment in these two areas, the mechanization of corn harvesting soared from 6.8% in 2007 to 42.8% in 2012, and is expected to surpass 48% in 2013; correspondingly, the mechanization of rice transplanting increased from 11% to 31.7%, and is estimated to reach 35.0% in 2013.

Global and China Agricultural Machinery Industry Report, 2013-2014 of ResearchInChina focuses on the following:

※Global agricultural machinery production and sales;
※Chinese agricultural machinery industry and agricultural mechanization;
※Development of major agricultural machinery products including tractor, harvester, rice transplanter and agricultural vehicles;
※ Development of agricultural machinery in seven provinces and cities including Shandong, Henan, Hebei, Anhui and Heilongjiang;
※ Operation of six global agricultural machinery enterprises and their development in China;
※Operation and development strategy of 14 key Chinese agricultural machinery enterprises.

Currently, John Deere, Case New Holland (CNH), AGCO and CLAAS, the top five agricultural machinery enterprises in the world, have all set up production bases in China.

John Deere: As of the end of November 2013, it established plants in cities including Tianjin, Jiamusi, Harbin and Ningbo.

CNH: It has eight companies in China, including four manufacturing plants in Harbin, Shanghai, Urumqi and Foshan. The Foshan sugar cane harvesting machinery plant and Urumqi cotton picker plant started production in August and September 2013 respectively.

CLAAS: It entered China in 2004, set up wholly-owned subsidiary CLAAS Agricultural Machinery Trading (Beijing) Co., Ltd. in September 2012, and acquired 85% stake in Shandong Jinyee, successfully making deployment in the Chinese agricultural machinery market.

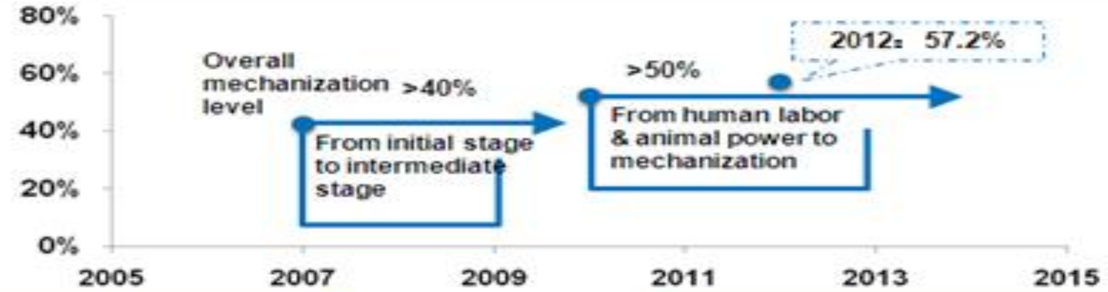
Facing competition with foreign companies, YTO Group, Foton Lovol, Dongfeng Agricultural Machinery, Shifeng Group, Luoyang Zhongshou, Chery Heavy Industries and other local agricultural machinery enterprises have accelerated the transformation and upgrading.

YTO Group successfully achieved the commercialization of power shift tractors, especially in the field of 220hp large power shift tractor, where it occupies nearly 100% of the market.

Chery Heavy Industries has seven production bases in Anhui, Henan, Zhejiang, Jilin and Xinjiang. It has successfully entered the fields of agricultural machinery including tractor, harvester and dryer. At the same time, it has actively implemented a “three-step” strategy of globalization, and set up research and development centers in developed countries like Italy and Japan.

China Agricultural Machinery Mechanization Level and Structure,2012

Two Strides



Unbalanced Crop Mechanization

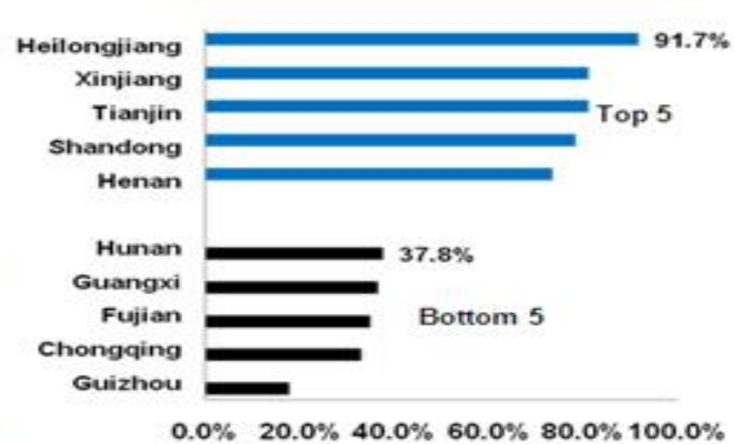
Wheat basically realized full mechanization, with an overall mechanization level of 93.21%

Overall mechanization level of corn was 74.95%, specifically, the mechanization level of plowing, sowing and harvesting hit over 90%, over 70% and 42.47% respectively

Overall mechanization level of rice was 68.82%, to be specific, the mechanization level of plowing, harvesting and sowing touched over 90%, over 70% and 31.67% separately

Required by the Ministry of Agriculture, rice mechanized planting and corn mechanized harvesting level will increase by 3 percentage points and 5 percentage points respectively in 2013

Unbalanced Regional Mechanization



Source：CAAMM; ResearchInChina

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