



Global and China Agricultural Machinery Industry Report, 2014-2016

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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 the implementation of policy of subsidies for purchasing agricultural machinery in 2004, China agricultural machinery industry has maintained double-digit growth, even with the operating revenue growth rate of 33.8% in 2011. However, China agricultural machinery industry transferred to a new situation ("New Normal") in 2014 as the in-depth adjustment of industrial structure accelerated. In 2014, the operating revenue only went up by 8.8% year on year, and the growth rate fell by 7.5 percentage points from 2013.

After years of rapid growth, China's tractor, wheat& rice harvester, transplanter and other markets declined to varied extent in 2014, in which the tractor market slumped most evidently, especially small tractors.

Although China agricultural machinery industry witnesses landslide, the total subsidies and agricultural mechanization level continue to rise. In 2014, the subsidies amounted to RMB23.755 billion, setting a new record high; the total power of agricultural machinery reached 1.076 billion kilowatts, representing a year-on-year increase of 3.6%; the agricultural mechanization level hit 61.0%, fulfilling the goal of "Twelfth Five-year" Plan in advance.

At the same time, the mechanization level of three major crops (wheat, corn and rice) has improved significantly, especially corn and rice. The mechanization rate of corn harvesting jumped from 10.6% in 2008 to 55% in 2014; and that of rice harvesting soared from 51.2% to 81.0%. In contrast, the mechanization of potato, cotton, rapeseed, peanut and other crops still stays at a low level, which will be the development focus of the industry in future.

In addition, national industrial policies, market potentials and other factors have propelled almost all of well-known foreign agricultural machinery enterprises and powerful Chinese machinery and equipment manufacturers to successively access into the Chinese agricultural machinery market.

John Deere: This leading agricultural machinery manufacturer in the world achieved the sales of USD32.96 billion in FY2014, of which USD27.12 billion came from agricultural machinery. Currently, it has set up plants in Tianjin, Harbin, Ningbo, Jiamusi and other places of China as well as established joint ventures with Tianjin Tractor Manufacturing Co., Ltd. and XCG to produce 20-to-120 horsepower tractors and 75-to-203 horsepower combine harvesters.

CNH: As of June 2015, it has established eight companies in China, including four manufacturing plants located in Harbin, Shanghai, Foshan and Urumqi. Harbin Base was officially put into operation in July 2014 as Northeast China's largest manufacturing base of agricultural machinery.

YTO Group: The business of the largest tractor producer in China is mainly conducted by its listed subsidiary -- First Tractor Company Limited. Impacted by the fast-declining domestic tractor market, the tractor sales volume of YTO fell by 22.6% year on year to 82,037 in 2014; the annual revenue from agricultural machinery dropped 18.7% year on year to RMB7.38 billion.

FotonLovol: In 2014, FotonLovol gained the revenue of RMB21.98 billion, wherein Lovol agricultural equipment revenue exceeded RMB10 billion. In 2015, the company develops medium and high-end agricultural machinery aggressively. In January, it acquired Matt Mark which is an European high-end agricultural machinery enterprise; in March, the phase I of its high-end agricultural machinery (mainly balers, grain dryers and the like) project with the total investment of RMB2 billion was officially put into operation.

Zoomlion Heavy Machinery: Formerly known as Chery Heavy Industry, ZoomlionHeavy Machinery changed its name in October 2014. The parent company Zoomlion holds 67.51% stake. The construction of ZoomlionBozhou Industrial Park commenced in February 2014 and ended in December of the same year, with the planned annual capacity of 1,500 large-scale forage harvesters, 10,000 self-propelled corn harvesters, 6,500 sets of large-sized agricultural machinery and 14,500 sets of key agricultural equipment parts.

The report focuses on the followings:

Status quo of global agricultural machinery market and agricultural machinery development in major countries;

China's major policies and subsidies for agricultural machinery;

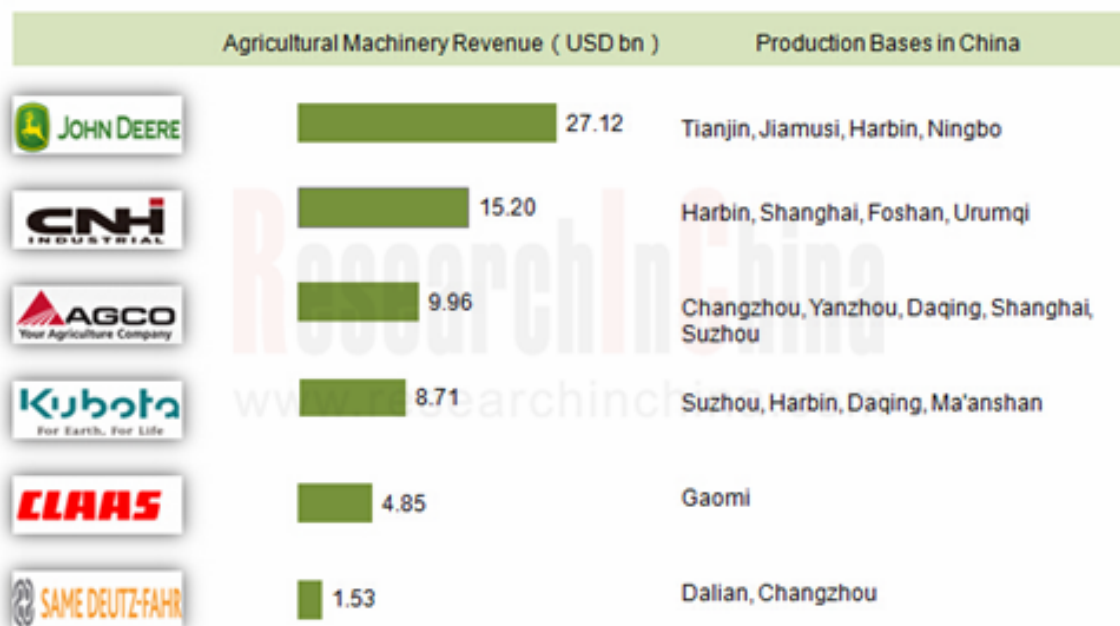
Overview, main products, major enterprises and agricultural mechanization of China's agricultural machinery industry;

Development of major agricultural machinery segments including tractors, harvesters, rice transplanters and agricultural vehicles;

Development of agricultural machinery industry in seven major provinces including Shandong, Henan and Heilongjiang;

Operation, R & D and development strategy of six global and 14 key Chinese agricultural machinery enterprises.

Agricultural Machinery Revenue of Major Global Agricultural Machinery Manufacturers and Their Production Bases in China, FY 2014



Note: the production bases above refer to those producing agricultural machinery vehicles, not including spare parts ;
 € 1 = \$ 1.2681, ¥ 1 = \$ 0.00824

Source : Global and China Global and China Agricultural Machinery Industry Report, 2014-2016 by ResearchInChina

1. Status Quo of Agricultural Machinery Industry Worldwide

- 1.1 Market Overview
 - 1.1.1 Production
 - 1.1.2 Import and Export
- 1.2 Major Countries
 - 1.2.1 The United States
 - 1.2.2 Canada
 - 1.2.3 Germany
 - 1.2.4 Italy
 - 1.2.5 Japan

2 Policy Environment of Agricultural Machinery Industry in China

- 2.1 Major Policies
- 2.2 Subsidies for Agricultural Machinery Purchase

3 Development of Agricultural Machinery Industry in China

- 3.1 Status Quo
 - 3.1.1 Overview
 - 3.1.2 Major Products
 - 3.1.3 Major Enterprises
- 3.2 Agricultural Mechanization
 - 3.2.1 Total Power and Structure of Agricultural Machinery

- 3.2.2 Ownership and Structure of Agricultural Machinery
- 3.2.3 Agricultural Mechanization Level
- 3.2.4 Agricultural Machinery Services

4 Key Agricultural Machinery in China

- 4.1 Tractor
 - 4.1.1 Current Development
 - 4.1.2 Product Structure
 - 4.1.3 Enterprise Pattern
- 4.2 Harvester
 - 4.2.1 Production and Sale
 - 4.2.2 Mechanized Harvesting of Main Crops
- 4.3 Transplanter
 - 4.3.1 Market Demand
 - 4.3.2 Demand Structure
 - 4.3.3 Export
 - 4.3.4 Key Companies
- 4.4 Agricultural Vehicles
 - 4.4.1 Market Situation
 - 4.4.2 Competition Pattern

5 Key Provinces & Municipalities of Agricultural Machinery Industry in China

- 5.1 Shandong
 - 5.1.1 Total Amount of Agricultural Machinery Equipment

- 5.1.2 Agricultural Mechanization Level
- 5.1.3 Agricultural Machinery Enterprises
- 5.1.4 Development Plan
- 5.2 Heilongjiang
 - 5.2.1 Total Amount of Agricultural Machinery Equipment
 - 5.2.2 Agricultural Mechanization Level
 - 5.2.3 Agricultural Machinery Enterprises
- 5.3 Henan
 - 5.3.1 Total Amount of Agricultural Machinery Equipment
 - 5.3.2 Agricultural Mechanization Level
 - 5.3.3 Development Plan
- 5.4 Hebei
 - 5.4.1 Total Amount of Agricultural Machinery Equipment
 - 5.4.2 Agricultural Mechanization Level
 - 5.4.3 Development Plan
- 5.5 Anhui
 - 5.5.1 Total Amount of Agricultural Machinery Equipment
 - 5.5.2 Agricultural Mechanization Level
 - 5.5.3 Agricultural Machinery Operation
 - 5.5.4 Development Plan
- 5.6 Hunan
 - 5.6.1 Total Amount of Agricultural Machinery Equipment
 - 5.6.2 Agricultural Mechanization Level

5.6.3 Development Plan

5.7 Jiangsu

5.7.1 Total Amount of Agricultural Machinery Equipment

5.7.2 Agricultural Mechanization Level

5.7.3 Agricultural Machinery Enterprises

6 Key Agricultural Machinery Companies Worldwide

6.1 John Deere

6.1.1 Profile

6.1.2 Operation

6.1.3 Development in China

6.2 CNH Industrial

6.2.1 Profile

6.2.2 Operation

6.2.3 Development in China

6.3 AGCO

6.3.1 Profile

6.3.2 Operation

6.3.3 Development in China

6.4 Claas

6.4.1 Profile

6.4.2 Operation

6.4.3 Development in China

6.5 Same Deutz-Fahr

6.5.1 Profile

6.5.2 Operation

6.5.3 Development in China

6.6 Kubota

6.6.1 Profile

6.6.2 Operation

6.6.3 Development in China

7 Key Agricultural Machinery Companies in China

7.1 YTO Group Corporation

7.1.1 Profile

7.1.2 Operation

7.1.3 First Tractor Company Limited

7.1.4 Development Strategy

7.2 Foton Lovol International Heavy Industry Co., Ltd.

7.2.1 Profile

7.2.2 Operation

7.2.3 R&D Capabilities

7.2.4 Development Strategy

7.3 Changzhou Dongfeng Agricultural Machinery Group Co., Ltd.

7.3.1 Profile

7.3.2 Operation

7.3.3 Development Strategy

7.3.4 Key Projects

7.4 Shandong Changlin Machinery Group Co., Ltd.

7.4.1 Profile

7.4.2 Operation

7.4.3 Agricultural Machinery Subsidiary-- Shandong Changlin Agricultural Equipment Co.,Ltd.

7.4.4 Development Strategy

7.5 Jiangsu Changfa Group

7.5.1 Profile

7.5.2 Operation

7.5.3 Agricultural Machinery Subsidiary --Jiangsu Changfa Agricultural Equipment Co., Ltd.

7.6 Shandong Shifeng (Group) Co., Ltd.

7.7 Shandong Wuzheng (Group) Co. Ltd.

7.8 Zoomlion Heavy Machinery

7.9 Shandong Juming

7.10 World Agricultural Machinery

7.11 CLAAS Jinyee

7.12 Modern Agricultural Equipment Co., Ltd.

7.13 Xinjiang Machinery Research Institute Co., Ltd.

7.14 Xingguang Agricultural Machinery

8 Summary and Forecast

8.1 Market

8.2 Enterprises

- 
- Gross Output Value of Agricultural Machinery Worldwide, 2005-2016E
 - Output Value Proportion of Agricultural Machinery in Major Regions Worldwide, 2007-2013
 - Output Value of Agricultural Machinery of Major European Countries, 2011-2013
 - Import and Export Value of Agricultural Machinery Worldwide, 2010-2013
 - Agricultural Machinery Export Value in Major Regions, 2011-2013
 - Agricultural Machinery Import Value in Major Regions, 2011-2013
 - Sales Volume of Major Agricultural Machinery in the United States, 2005-2014
 - Sales Volume of Major Agricultural Machinery in Canada, 2005-2014
 - Major Indicators of Agricultural Machinery Industry in Germany, 2010-2013
 - Sales Volume of Agricultural Machinery Industry in Germany by Product, 2010-2013
 - Major Indicators of Agricultural Machinery Industry in Italy, 2010-2013
 - Output Value and Sales of Agricultural Machinery in Japan, 2010-2015
 - Output Value and Sales of Agricultural Machinery Industry in Japan by Product, 2013-2014
 - Major Policies on Agricultural Machinery Industry in China, 2012-2015
 - Subsidies for Agricultural Machinery in China, 2004-2016E
 - Major Indicators of Agricultural Machinery Industry in China, 2010-2015
 - Tractor Output of Backbone Enterprises in China, 2012-2014
 - Harvester Output of Backbone Enterprises in China, 2012-2014
 - Output of Major Agricultural Machinery in China, 2010-2014
 - Tractor Output and YoY Growth in China by Provinces & Municipalities, 2014
 - Harvester Output and YoY Growth in China by Provinces & Municipalities, 2014
 - Total Power of Agricultural Machinery in China, 2004-2016E
 - Power of Agricultural Machinery per Hectare of Farmland in China, 2007-2016E
 - Total Power of Main Agricultural Machinery Equipment, 2005-2015
 - Total Power of Agricultural Machinery in Main Provinces & Municipalities, 2014

- Ownership of Major Agricultural Machinery in China, 2005-2015
- Ownership Ratio of Small-sized Tractors and Large-and Medium-sized Tractors in China, 2001-2016E
- Supporting Ratio of Large-and Medium-sized Tractors in China, 2001-2016E
- Supporting Ratio of Small-sized Tractors in China, 2001-2016E
- Agricultural Mechanization Service Acreage in China, 2010-2015
- Overall Level of Agricultural Mechanization in China, 2004-2016E
- Mechanization Level of Crops in China by Ploughing, Sowing and Harvesting, 2004-2015
- Overall Level of Agricultural Mechanization in Major Chinese Provinces & Municipalities, 2014
- Quantity of Agricultural Machinery Service Organizations and Cooperatives in China, 2008-2016E
- Total Revenue of Agricultural Machinery Services, 2008-2016E
- Major Indicators of China Tractor Industry, 2012-2015
- Output and YoY Growth Rate of Tractors in China, 2009-2016E
- Output of Tractors in China by Type, 2009-2015
- Top 5 Enterprises in Chinese Medium and Large-sized Wheel Tractor Market, 2014
- Top 5 Enterprises in Chinese Small-sized Wheel Tractor Market, 2014
- Ownership and Structure of Harvesters in China, 2007-2015
- Output and Sales Volume of Combine Harvesters in China, 2008-2016E
- Mechanization Level of Three Crops in China, 2008-2015
- Ownership of Wheat Harvester in China, 2010-2015
- Ownership of Corn Harvester in China, 2008-2015
- Three Industrial Clusters of Corn Harvester in China
- Main Companies of Corn Harvester in China by Product, 2014
- Sales Volume of Rice Transplanters in China, 2005-2016E
- Ownership and Planting Mechanization Rate of Rice Transplanters in China, 2009-2016E
- Sales Volume and Proportion of Rice Transplanters in China, 2010-2014

- 
- Demand Structure of Handheld and Ride-on Transplanters in China, 2014
 - Sales Volume and Growth Rate of Transplanters in China by Region, 2014
 - Transplanter Export Value and YoY Growth in China by Destination, 2014
 - Transplanter Market Competition Pattern in China, 2014
 - Output of Low-speed Vehicles (Agricultural Vehicles) in China, 2009-2015
 - Top 10 Three-wheeled Vehicle Enterprises in China by Sales Volume, 2013-2014
 - Top 10 Low-speed Truck Enterprises in China by Sales Volume, 2013-2014
 - Total Power and Value of Agricultural Machinery in Shandong, 2008-2016E
 - Ownership of Major Agricultural Machinery in Shandong, 2009-2015
 - Overall Level of Agricultural Mechanization in Shandong, 2008-2016E
 - Major Agricultural Machinery Enterprises in Shandong, 2014
 - Total Power of Agricultural Machinery in Heilongjiang, 2008-2016E
 - Ownership of Major Agricultural Machinery in Heilongjiang, 2011-2014
 - Overall Level of Agricultural Mechanization in Heilongjiang, 2008-2016E
 - Total Power of Agricultural Machinery in Henan, 2008-2016E
 - Ownership of Major Agricultural Machinery in Henan, 2008-2014
 - Overall Level of Agricultural Mechanization in Henan, 2008-2016E
 - Total Power of Agricultural Machinery in Hebei, 2008-2016E
 - Ownership of Major Agricultural Machinery in Hebei, 2008-2014
 - Overall Level of Agricultural Mechanization in Hebei, 2008-2016E
 - Total Power of Agricultural Machinery in Anhui, 2008-2016E
 - Ownership of Major Agricultural Machinery in Anhui, 2010-2014
 - Overall Level of Agricultural Mechanization in Anhui, 2008-2016E
 - Total Revenue from Agricultural Machinery Operation in Anhui, 2004-2015
 - Total Power of Agricultural Machinery in Hunan, 2008-2016E

- 
- Overall Level of Agricultural Mechanization of Rice in Hunan, 2008-2016E
 - Total Power of Agricultural Machinery in Jiangsu, 2008-2016E
 - Ownership of Major Agricultural Machinery in Jiangsu, 2012-2014
 - Overall Level of Agricultural Mechanization in Jiangsu, 2008-2016
 - Major Agricultural Machinery Enterprises in Jiangsu, 2015
 - Net Sales and Net Income of John Deere, FY2009-FY2014
 - Net Sales and Operating Income of John Deere by Business, FY2009-FY2014
 - Net Sales of John Deere by Region, FY2009-FY2014
 - Production Bases of John Deere in China, 2014
 - Revenue and Profit of CNH, 2012-2014
 - Revenue of CNH by Business, 2013-2014
 - Net Sales and Net Income of AGCO, 2010-2014
 - Net Sales Structure of AGCO by Product, 2014
 - Net Sales Structure of AGCO by Region, 2014
 - China-based Subsidiaries of AGCO
 - Net Sales and Net Income of Claas, FY2010-FY2014
 - Net Sales Structure of Claas by Region, FY2014
 - Net Sales and Net Income of Same Deutz-Fahr, 2010-2014
 - Net Sales Structure of Same Deutz-Fahr, 2013-2014
 - Revenue and Net Income of Kubota, FY2011-FY2015
 - Revenue of Kubota by Region, FY2011-FY2015
 - Revenue of Kubota by Business, FY2011-FY2015
 - Major Subsidiaries of Kubota in China, 2015
 - Revenue of YTO Group, 2010-2015
 - Revenue and Net Income of First Tractor, 2010-2015

- Operating Revenue and Gross Margin of First Tractor by Business, 2011-2014
- Sales Volume and Revenue of Agricultural Machinery of First Tractor by Product, 2013-2014
- Capacity and Output of First Tractor's Main Products, 2012-2014
- Operating Revenue of First Tractor by Region, 2009-2014
- Revenue of FotonLovol, 2009-2015
- Revenue of Agricultural Equipment Sector of FotonLovol, 2010-2015
- Revenue of Changzhou Dongfeng Agricultural Machinery Group, 2009-2015
- Revenue of Shandong Changlin Machinery Group, 2009-2015
- Revenue of Jiangsu Changfa Group, 2009-2015
- Revenue and Profit & Tax of Shandong Shifeng, 2009-2015
- Output of Shandong Shifeng's Main Products, 2009-2014
- Revenue of Shandong Wuzheng, 2009-2015
- Sales Volume of Shandong Wuzheng's Main Products, 2009-2014
- Revenue of Shandong Juming, 2009-2015
- Revenue of World Agricultural Machinery, 2010-2015
- Revenue of Modern Agricultural Equipment, 2009-2015
- Operating Revenue of Modern Agricultural Equipment by Business, 2011-2014
- Revenue and Net Income of Xinjiang Machinery Research Institute, 2009-2015
- Operating Revenue of Xinjiang Machinery Research Institute by Region, 2010-2014
- Operating Indicators of Major Subsidiaries of Xinjiang Machinery Research Institute, 2014
- Revenue and Net Income of Xingguang Agricultural Machinery, 2012-2015
- Revenue of Xingguang Agricultural Machinery by Product, 2012-2014
- Revenue of Xingguang Agricultural Machinery by Region, 2012-2014
- Top 5 Clients of Xingguang Agricultural Machinery, 2012-2014
- Number of Dealers and Revenue of Xingguang Agricultural Machinery, 2012-2014

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