

Global and China Agricultural Machinery Industry Report, 2016-2020

Jul. 2016

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.

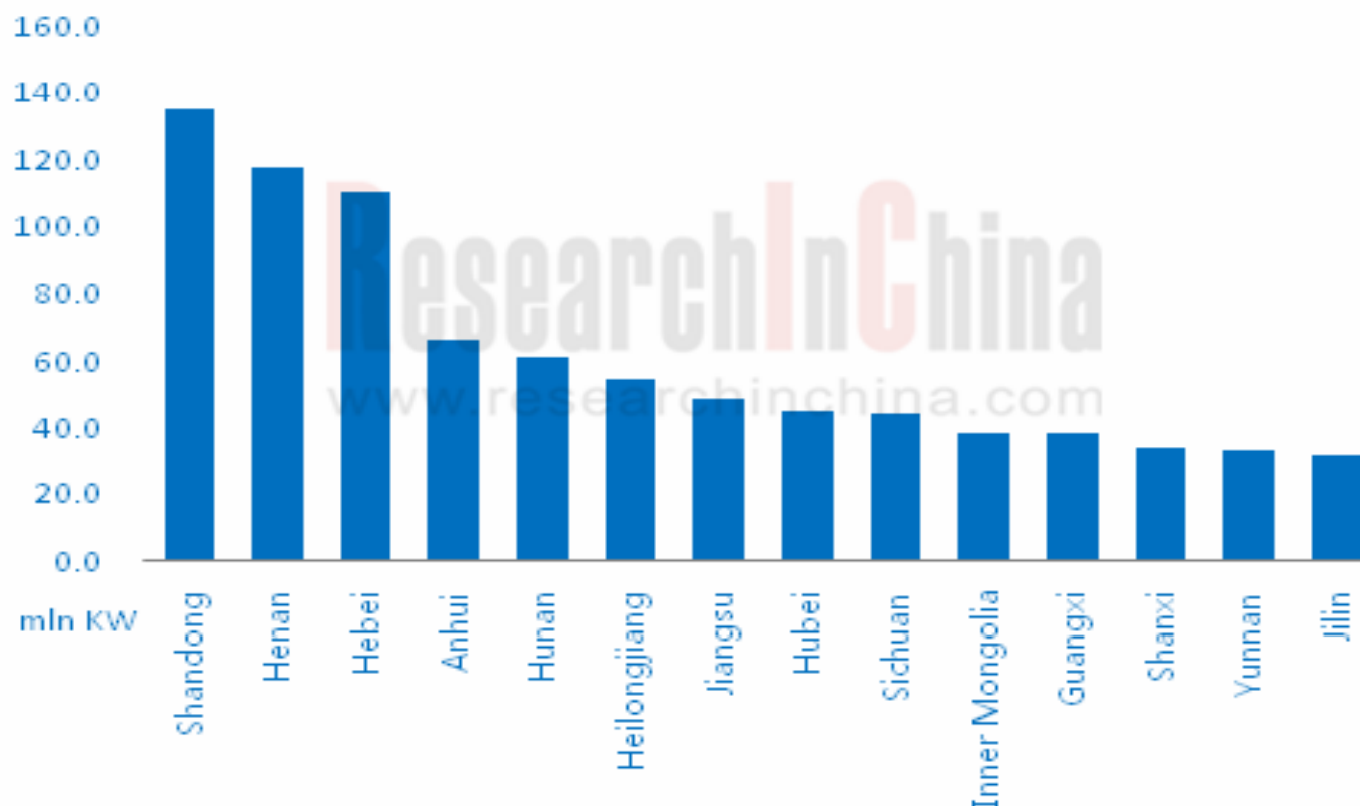
Abstract

In recent years, as China's economic development has entered a new normal, agricultural machinery industry also sees the end of a golden decade (2004-2013) of rapid growth and expands at a medium-high growth rate. In 2015, Chinese agricultural machinery enterprises with annual prime operating revenue of RMB20 million and more registered combined revenue of RMB428.37 billion, edging up 2.5% from a year ago, at the weakest pace over the past ten years. Features are presented as follows:

- 1) Agricultural machinery subsidies decline gradually. Funding for agricultural machinery subsidies and the subsidies for each set of agricultural machinery dropped and the scope of subsidies narrowed in 2015 and 2016.
- 2) The level of agricultural mechanization improves. The total power of agricultural machinery was 1.1 billion kilowatts in 2015 and is expected to hit 1.2 billion kilowatts in 2020. The overall level of mechanization in crop plowing, sowing, and harvesting came to 63% in 2015 and will touch 70% in 2020.
- 3) Standards for agricultural machinery emission are upgraded. The Ministry of Environmental Protection announced the implementation of Limits and Measurement Methods for Exhaust Pollutants from Diesel Engines of Non-road Mobile Machinery (CHINA III, IV) in January 2016, requiring that, from December 1st, 2016, all domestically-manufactured, imported and sold agricultural machinery shall not be equipped with the diesel engines that fail to conform to the Standard (III).
- 4) Demand for agricultural machinery changes. With evolution of farming practices from traditional ones to subsoiling and deep ploughing and of operator from individual household to family farm and agricultural machinery cooperative, the demand for large and high-power agricultural machinery has kept growing. In 2015, China experienced declines in both output and output value of tractors but saw over 30% increase in 100HP-above large tractors.
- 5) Import and export of agricultural machinery both fall. China imported USD2.28 billion and exported USD10.17 billion worth of agricultural machinery in 2015, down 8.4% and 3.8%, respectively, over the previous year.
- 6) "Agricultural Machinery + Internet" starts to prevail. In 2015, a group of e-commerce firms including Taobao and JD began pushing forward online agricultural machinery sales and services with agricultural machinery enterprises.

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Total Power of Agricultural Machinery in China by Region, 2015



With transformation and upgrading of the Chinese agricultural machinery market, domestic agricultural machinery enterprises have actively enhanced their corporate competitiveness via resource consolidation, merger & reorganization, and independent innovation.

Foton Lovol International Heavy Industry Co., Ltd.: The company has accelerated its global strategy in recent years, taking full control of Arbos and MaterMacc in 2014, further integrating Lovol European Technical Center and factories of Arbos and MaterMacc to set up LovolArbos Group Spa in September 2015 and acquiring Italian GOLDONI, a well-known European manufacturer of orchard tractors, in the following December.

Changzhou Dongfeng Agricultural Machinery Group Co., Ltd.: With tractors as its primary business, the company has been actively in exploring combine-harvester and rice transplanter markets. The company and Xinghua Economic Development Zone entered into an agreement on investment in XinghuaDongfeng Agricultural Machinery Industrial Park which will be primarily engaged in manufacturing of agricultural equipment like grain combine harvesters with Phase I starting construction in July 2016 and going into trial production in October 2017.

Xingguang Agricultural Machinery Co., Ltd.: In 2015, the company sold 7,796 combine harvesters, its leading products, and recorded revenue of RMB559 million, 95.5% of the company's total. To perfect product system, the company bought a 56.66% stake in Jiangsu Zhenggong Cotton-picker Co., Ltd. and a 51% stake in Hubei Yulong Machinery Co., Ltd. in March 2016.

Global and China Agricultural Machinery Industry Report, 2016-2020 by ResearchInChina highlights the followings:

- Global agricultural machinery market and developments in major countries;
- Main policies on agricultural machinery and agricultural machinery subsidies in China;
- Agricultural machinery industry in China (overview, main products, status of key enterprises, and level of agricultural mechanization);
- Status quo of the Chinese tractor, harvester, rice transplanter, and agricultural vehicle markets;
- Agricultural machinery industry in 17 major provinces in China including Heilongjiang, Shandong, and Henan;
- 7 global and 18 major Chinese agricultural machinery enterprises (operation, R&D, development strategy, etc.).

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