



**Global and China Agricultural Machinery
Industry Report, 2017-2021**

July 2017

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 2015, China's agricultural industry has transferred from the high-growth gold age (2004-2014) to the medium and low-speed growth stage with in-depth adjustment. China's agricultural machinery industry only saw the sales growth rate of 5.8% in 2016, 1.6 percentage points lower than the growth rate of the entire machinery industry, which was mainly affected by lower agricultural machinery subsidies, falling crop prices, the adjustment of the agricultural planting structure, the transition from Chinese national emission standards II to III and other factors. In 2017, this slow growth trend is more obvious, and the annual sales growth rate is expected to be about 4.0%.

As the Chinese agricultural machinery market entered into the new normal state and the demand for traditional agricultural machinery (tractors, combine harvesters, planters, rotary tillers and others) was significantly saturated, the tractor output of Chinese backbone enterprises fell 9.0% year on year in 2016; meanwhile, their output of self-propelled wheeled grain harvesters and corn harvesters dropped 11.1% and 43.5% year on year respectively. In contrast, rice transplanters, crawler harvesters and grain dryers performed better.

Although China's agricultural machinery industry is facing many challenges, the industry is still promising in the long run. The state has introduced Thirteenth Five-Year Plan for National Agricultural Mechanization Development, Action Program for Agricultural Machinery and Equipment Development (2016-2025) and other policies to promote the full agricultural mechanization. Data show that China's comprehensive agricultural mechanization level hit more than 65% in 2016, away from the goal of 70% in 2020.

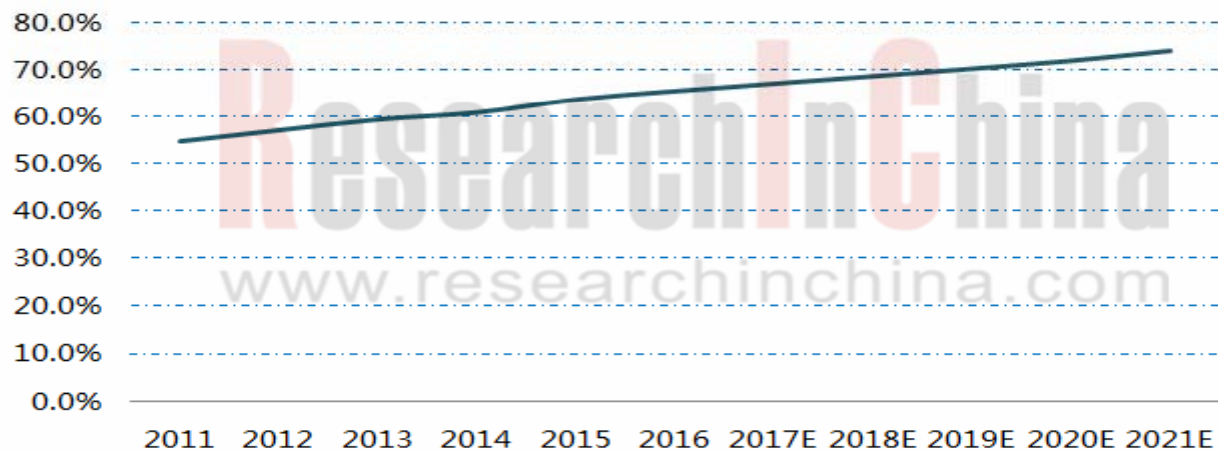
On the other hand, the technologies of mechanized planting, corn mechanized harvesting and other weak links are promoted more radically while the traditional agricultural machinery market declines; the market share of power shift tractors, vertical axis harvesting machinery and supporting large complex agricultural machinery keeps rising. Therefore, high-end and intelligent products will become new growth engines in the market in the future with the further adjustment of the agricultural machinery demand structure.

In the face of the sluggish agricultural machinery market and the drop of the downstream demand, Chinese agricultural machinery enterprises compete with each other more intensely day by day. Some enterprises even witness the broken capital chain and cannot survive. However, some other enterprises have achieved steady growth by launching new products (such as Zoomlion, Sinoagri BOYO), opening up overseas markets (Foton Lovol, China YTO), expanding the industrial chain (Jiangsu World), mergers and acquisitions (LuoYang Zhongshou Machinery Equipment, Lion Agricultural Equipment) and other ways..

The report focuses on the followings:

- Status quo of global agricultural machinery market, agricultural machinery development and key enterprises in major countries;
- China's agricultural machinery market environment and policies (including subsidies, planning, emission standards, etc.);
- Overview, main products, major enterprises, agricultural mechanization and future trends of China's agricultural machinery industry;
- Status quo of major agricultural machinery segments including tractors, harvesters, rice transplanters, cotton pickers and grain dryers;
- Development of agricultural machinery industry in 17 major provinces including Shandong, Henan and Heilongjiang;
- Operation, R & D and development strategy of 8 global and 18 key Chinese agricultural machinery enterprises.

Overall Level of Mechanization in Crop Ploughing, Sowing and Harvesting in China, 2011-2021E



Source: Global and China Global and China Agricultural Machinery Industry Report, 2017-2021

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