



Global and China Agricultural Machinery Industry Report, 2020-2026

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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

Affected by insufficient demand for traditional products, adjustment of purchase subsidy policies, and lower prices of grain crops, China's agricultural machinery sales remain a downward trend.

In 2019, the total revenue of agricultural machinery enterprises (each with annual revenue over RMB20 million) nationwide was RMB 246.467 billion, a decrease of 4.43% over the previous year, and the industry's profits were RMB 10.339 billion, down 0.25% from a year ago. In 2019, China produced 40,000 large tractors on a par with that in 2018; 238,000 medium-sized tractors were produced with a year-on-year increase of 17.2%; the output of small tractors jumped 3.7% year-on-year to 340,000 units; the harvester output was estimated at 255,000 units, a fall of 11.2% on an annualized basis.

China is superior in exporting agricultural machinery amid less dependence on imported products on account of ever better technologies about China-made agricultural machinery. In 2019, China imported 10,945 agricultural machines and fell 9.1% from the previous year. At the same time, China's agricultural machinery exports in 2019 plummeted by 17.2% year-on-year due to the depressed industry, the upgrading of National Emission Standards IV, and the Sino-US trade war. By the end of 2018, the total power of China's agricultural machinery had reached 1.0037 billion kW, up 1.6% on a like-for-like basis. The comprehensive mechanization rate of crops for the whole year edged up 1.87 points YoY to 69.1%; wherein, the overall mechanization rate of wheat fetched the highest 95.89%, and the comprehensive mechanization rate of rice, corn and soybean was above 80% apiece. Under favorable policies, the comprehensive mechanization rate of crops in China is rising year by year, expectedly reaching 77% by 2026.

At present, China's plant protection UAV penetration rate is far below the world average. It is clearly put forward in the State Council's Guidelines on Accelerating the Transformation and Upgrade of Agricultural Mechanization and Agricultural Machinery & Equipment Industry issued in 2018 to 'actively develop agricultural aviation, regulate and popularize plant protection UAVs'. So far, Hubei, Jiangxi, Shandong, Hunan, Anhui, Guangdong and other provinces and cities have rolled out subsidies for plant protection UAVs each of which is granted more than RMB 10,000.

Subsidy of Plant Protection UAV in Major Provinces of China, 2019

Provinces	Product	Subsidy (RMB/unit)
Chongqing	Multi-rotor plant protection UAV	16,000
	Single-rotor plant protection UAV	29,000
Jilin	Electric multi-rotor plant protection UAV with rated drug load more than 10L (It is only implemented in pilot counties and urban areas where plant protection UAV are standardized)	15,000
	Electric single-rotor plant protection UAV with rated drug load more than 10L (It is only implemented in pilot counties and urban areas where plant protection UAV are standardized)	15,000
Anhui	10-15L Electric multi-rotor plant protection UAV	16,000
Jiangxi	10-15L Electric plant protection UAV	15,000
	15-20L Electric plant protection UAV	20,000
Hubei	10-20L Electric multi-rotor plant protection UAV	15,000
Jiangsu	10L and above Electric multi-rotor plant protection UAV	14,000
Gansu	Electric multi-rotor plant protection UAV with rated drug load more than 10L	16,000
Zhejiang	Electric multi-rotor plant protection UAV	16,000
	Electric multi-rotor plant protection UAV (Equipped with centimeter-level positioning module and accessory equipment)	20,000
	Electric single-rotor plant protection UAV	30,000
Shaanxi	10-20L Electric plant protection plane	16,000
Qingdao	Electric multi-rotor plant protection UAV with rated drug load more than 10L	16,000
Shandong	Multi-rotor plant protection UAV with rated drug load more than 15L	16,000
	Multi-rotor plant protection UAV, 10L≤rated drug load< 15L	10,000
Ningxia	10-15L Electric plant protection UAV	16,000
	Above 15L Electric multi-rotor plant protection UAV	19,000
Note: above data is as of June 19, 2019		

Source: ResearchInChina

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Opportunities come with challenges in the agricultural machinery of China. The growing number of collective users such as cooperatives, farms, and agricultural reclamations year by year and the policies for subsoiling, deep plowing, land circulation and agricultural machinery purchase subsidies are conducive to the burgeoning demand for large, high-end and intelligent machines like high-power tractors. With stricter environmental requirements, off-road machinery emission standards will be inevitable upgraded and the technical threshold for industry accession will be raised ever.

Highlights in the report:

- ◆ Status quo of global agricultural machinery market, development of agricultural machinery in major countries and key enterprises, etc.;
- ◆ China's agricultural machinery market environment and policy climate (including planning, subsidies and emission standards for agricultural machinery);
- ◆ China's agricultural machinery industry (overview, main products, major enterprises, agricultural mechanization , future trends);
- ◆ Chinese tractors, harvesters, rice transplanters, cotton pickers, grain dryers, plant protection UAVs (sales volume, ownership, market characteristics, key enterprises, and development trends);
- ◆ Development of agricultural machinery industry in China's 17 major agricultural machinery producing provinces (including Heilongjiang, Shandong, Henan, etc.);
- ◆ 8 global and 18 Chinese agricultural machinery enterprises (operation, R&D, development strategy, etc.)

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8.1 Summary

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