

Global and China Agricultural Machinery Industry Report, 2014-2016

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Abstracts

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:

20120114.gif Status quo of global agricultural machinery market and agricultural machinery development in major countries;

20120114.gif China's major policies and subsidies for agricultural machinery;

20120114.gif Overview, main products, major enterprises and agricultural mechanization of China's agricultural machinery industry;

20120114.gif Development of major agricultural machinery segments including tractors, harvesters, rice transplanters and agricultural vehicles;

20120114.gif Development of agricultural machinery industry in seven major provinces including Shandong, Henan and Heilongjiang;

20120114.gif Operation, R & D and development strategy of six global and 14 key Chinese agricultural machinery enterprises.

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