

India Agricultural Equipment Market Outlook to 2017 - High Labor Scarcity and Government Subsidies Driving Agricultural Mechanization

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Abstracts

EXECUTIVE SUMMARY

The report titled 'India Agricultural Equipment Market Outlook to 2017 – High Labor Scarcity and Government Subsidies Driving Agricultural Mechanization' provides a comprehensive analysis of the various aspects such as market size, segmentation, trends and developments and future projections of the tractors, power tillers, threshers, rotavators and combines harvesters as key segments of the market. The report provides the market share and company profiles of major players in major segments. The report also covers the emerging segment of rice transplanters and its growth driving factors in the Indian market.

The Indian agricultural equipment market is experiencing a rapid growth with expected strong potential for future growth as well. In the year 2011, the demand for agricultural machinery in Asia-Pacific region was more than twice than in any other region. In Asia-Pacific, India has remained one of the primary nations which fuelled the growth of the agricultural equipment market. The tractors, power tillers, combine harvesters and rice trans-planters are some of the equipments for which a surge in demand has been witnessed over the past few years.

The tractors account for the largest share in the agricultural equipment market of India representing around ~% of the total market. These are followed by threshers which account for ~% of the market. The power tillers are the third largest segment and hold ~% of the Indian agriculture equipment market.

The tractors market in India is estimated at ~ units annually by sales, which has grown

with a CAGR of 11.8% during FY'2006-FY'2012 from ~ units in FY'2006. The Indian tractor market has traditionally been dominated by medium HP tractor segment which includes 31-40 HP tractors. However, a higher growth has been observed in the upper and lower HP segments over the years while the rate of growth in medium HP segment is almost moderate.

The current market for power tillers in India is estimated at ~ units annually by sales. The market for power tillers in India is mainly concentrated in the eastern and southern parts of the country owing to the small land holdings per farmer in these regions and high cultivation of paddy crops. The power tillers market in India is dominated by two players from south India- VST Tillers and Kerala Agro Machinery Corporation Ltd, KAMCO who have the market shares of ~% and ~% respectively.

The combine harvesters market in India is estimated at ~ units annually by sales which have grown by a CAGR of 28.9% since FY'2006 from ~ units annually. The tractor mounted combine harvesters occupy around ~% of the total combine harvesters market in India. This is followed by self-propelled combine harvesters which represent 33.0% of the market. Manufacturers such as Preet Agro Industries Pvt Ltd, Balkar Combines, Vishal Combines, Standard Combines, Kartar Agro Industries Pvt Ltd, Hira Agro Industries and others are some of the manufacturers based in Punjab that have a strong presence in the combine harvester market in India.

The threshers market in India is highly un-organized and is dominated by large number of small and medium scale enterprises (SMEs) located majorly in states of Punjab, Haryana, UP, Bihar, Madhya Pradesh, Gujarat, Maharashtra and Andhra Pradesh. The future growth of the threshers market is estimated at a CAGR of 5.2% during FY'2013-FY'2017 where the market is expected to reach ~ units annually by sales in FY'2017 from ~ units in a year in FY'2013.

The rotavators are being considered better than the conventional tillage equipments among the Indian farmers. These equipments save considerable amount of fuel and accomplish soil pulverization in short time. The rotavators market in India is expected to reach at a size of ~ units in a year in FY'2017 by growing at a CAGR of 20.4% from ~ units in FY'2013.

The market for rice transplanters in India was almost nil 3-4 years back as the rice transplantation was done completely manually with the use of labor. Presently, many small companies in India are importing rice transplanters from China and marketing them in the Indian market. The high subsidies provided by the government are expected

to encourage large number of paddy farmers to purchase rice transplanters in coming years. The various state governments provide subsidy up to 50% on the purchase of the machine.

KEY TOPICS COVERED IN THE REPORT

The market size of the India agricultural equipment market by value and volume.

The market segmentation of the agricultural equipment market by type of product.

The market size of the tractors market in India by domestic sales.

Market segmentation of the tractors market on the basis of horsepower.

Trends and developments in the tractors market in India.

Market share of major players in the tractors market in India.

Future outlook and projections of the tractors market in India.

Market size of the power tillers market in India.

Market share and profiles of major players in the power tillers market in India.

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Market size of the combine harvesters in India.

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Market size, future outlook and projections of the rotavators market in India.

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