

Comparative SWOT & Strategy Focus - 2015-2018 - World's 6 Leading Agriculture Equipment Manufacturers - John Deere, CNH, AGCO, CLAAS, SAME Deutz-Fahr, Kubota

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Abstracts

The global agriculture industry is driven by strong, long-term fundamentals & growth drivers linked directly to a rapidly growing global population with the global agricultural output required to double itself by 2050 from current levels, in order, to match & meet global food demand; which is estimated to grow rapidly through the middle to the end of the century given the world's significant population growth rate; projected to be spearheaded by developing & least developed nations of the world which are projected to have 3.2 billion additional inhabitants by 2050 as against developed nations which are likely to witness minimal changes through the projected horizon. This need to increase global crop production output & enhance efficiency will necessitate & drive increased utilization of mechanized & precision farming practices, especially, across emerging, developing & least developed nations over medium to long term to increase overall crop yield & efficiency driving demand for new agriculture machinery. A significant share of demand for agriculture equipment across traditional markets, on the contrary, is likely to originate from the large & high horsepower equipment segment with ongoing consolidation of farms. Additionally, product portfolio renewal by key industry OEMs & introduction of innovations & cutting edge technologies, driven by continued R&D initiatives; delivering enhanced operating performance, efficiency, productivity & operator comfort besides optimized operating economics; are likely to be key drivers of replacement demand across traditional markets over medium term.

The near term dynamics for the industry, however, are complex & difficult with significant pressures; emanating from an altered supply side economics; likely to persist over near term with record crop production projections for 2014 for corn & soyabean

across North America, Europe & Latin America regions impacting crop prices & farm incomes significantly. Farm incomes in the U.S. alone are projected to decline by 14% for 2014 with the contraction trend likely to persist through 2016 which is likely to impact purchasing power directly, besides, triggering a correction in farm land prices transpiring into a significant impact on agriculture machinery sales over near term. Further, an increase in corn planting acreage across most regions of-late; driven by the earlier surge in corn prices to meet growing demand for biofuels necessitated by legislative mandates across the U.S. & EU, has already brought down corn prices by almost 50% from the peaks last witnessed in 2012. Additionally, proposed plans for amendment in Ethanol fuel mandates across the EU & the U.S. over near term, with the emergence & certification of non-feedstock based biofuels, threatens to further complicate the situation & impact corn crop dynamics significantly. The recent surge in U.S. Dollar, too, has been unfavorable with respect to competitiveness & profitability of U.S. based agricultural exports. Thus, the overall, near term picture for the industry looks grim despite presence of strong, long-term fundamentals & demand drivers.

Most industry OEMs are in the process of realigning production & inventory levels with projected demand across markets besides rationalizing & consolidating their industrial base across traditional markets aiming to optimize overall cost base amid continued pressures on top line growth & profitability which are likely to persist over near term. Additionally, the OEMs are continuing with their R&D pursuits & renewal of product portfolio to stimulate new demand with an enhanced value proposition while focusing on ancillary growth avenues. For instance, John Deere's recent foray into the pre-owned equipment market and AGCO's enhanced focus on & scaling up of GSI business .

Against this backdrop, the report takes a macro view of the global agriculture equipment market and provides a comprehensive Comparative SWOT Framework Analysis on the World's 6 leading agriculture equipment manufacturers besides analyzing their overall Strategy Focus & providing insights into the Key Strategies & Plans being conceptualized, formulated & implemented by each company for the medium term horizon. The report analyzes the Strengths & Weaknesses of the industry players from a standalone as well as relative perspective through a Comparative SWOT framework analysis incorporating a detailed analysis of their Internal & External environment respectively focusing on key, strategic parameters, which include: analysis of overall Cost Base & Structure, Resources & Key Competencies, Profitability & Profit Sources, Product Portfolio Analysis & its Strategic Positioning, Key Competitor Analysis across Product Segments & Degree of Competitive Intensity, Competitive Market Positioning across Key Global Markets, overall Strategic Orientation & Analysis of Key Strategies & Plans, R&D Capabilities & Programs being pursued. The framework, after analyzing

strategic positioning of OEMs, analyzes their overall strategic fit & the degree of strategic responsiveness to external environmental factors, which include, prevailing industry dynamics & emerging as well as latent industry trends, issues, challenges & potential risk factors to assess their ability to be able to derive further business growth by capitalizing on potential growth opportunities effectively while negating threats simultaneously over near to medium term.

Additionally, the report provides a comprehensive analysis of key & emerging trends, in addition, to providing key insights into the significant industry developments and analyzing overall dynamics through a force field analysis on the global agriculture industry.

Relevance & Usefulness: The report will be useful for:

Strategic Planning, Competitive Analysis & Benchmarking Exercise

Comprehensive Strategic, Competitive Assessment & Analysis of each Company

Insights into Key Strategies & Plans being pursued by each key Industry Player

Comprehensive Standalone & Comparative SWOT Framework Analysis on each Company

Identifying & highlighting areas for potential Strategic Changes, Adjustments & Realignment

Comprehensive analysis of Key and Emerging Industry Trends & Growth Opportunities

Analysis of Key Forces Shaping the Industry's Future & their overall Dynamics

Strategic Perspective on the Industry's Near to Medium Term Outlook

Analysis of Emerging Industry Landscape and Key Issues & Challenges

For Whom:

The report is a niche, key & vital resource on the Business Strategy Domain given its unique disposition & strategic focus on leading Global Agriculture Equipment Manufacturers. The report would be quintessential for those having strategic interest in the Global Agriculture Industry/Agriculture Machinery Manufacturing or any of these companies & will be especially useful for Key Decision-Makers, Top Management of Companies, OEMs, Suppliers, Distributors, Vendors and other Key Players in the Industry Value Chain as well as existing & potential Investors, Industry & Company Analysts, M&A Advisory Firms, Strategy & Management Consulting Firms, PE Firms, Venture Capitalists & all those associated with the Global Agriculture Industry or any of these companies.

Highlight:

The report is comprehensive yet concise & compact at the same time; is custom-built for meetings & presentations, being built on the Microsoft PowerPoint platform; in addition, to being a ready self-reckoner as well as a quick reference guide driving, enabling & ensuring prompt and informed decision making.

Contents

SECTION 1

Business Structure & Strategic Snapshot – For each of the 6 Leading Agriculture Equipment Manufacturers

- a) Founded
- b) Headquartered
- c) Business Segments
- d) Employees
- e) Revenues
- f) Market Capitalization
- g) Key Executives
- h) Shareholding/Ownership Pattern & Structure

SECTION 2

Financial Performance Analysis – Q1-Q3 2014 Vs. Q1-Q3 2013, H1 2014 Vs. H1 2013 & 2013 Vs. 2012 Charts & Analysis for each Company:

- Sales Revenues Growth Trend
- Gross Earnings & Margin Trend
- Operating Earnings & Margin Trend Analysis
- Profitability Growth Trend
- Net Profit Margin Analysis
- Cash from Operations & Free Cash Flow Position
- R&D Expenditure Growth Trend
- CAPEX Trend

SECTION 3 STRATEGIC POSITIONING SWOT ANALYSIS – FOR EACH OF THE 6 KEY INDUSTRY OEMS

- Sources of Strengths to be Leveraged
- Weaknesses to Overcome
- Opportunities for Growth
- Threats to be Mitigated & Negated

SECTION 4

Comparative SWOT Framework Analysis

John Deere & Co.
CNH Industrial N.V.
AGCO Corporation
CLAAS Group
SAME Deutz-Fahr Group S.p.A.
Kubota Corporation

SECTION 5

Strategy Focus 2015-2018 Key Strategies & Plans – For each of the 6 Leading Global Industry Players

John Deere & Co.
CNH Industrial N.V.
AGCO Corporation
CLAAS Group
SAME Deutz-Fahr Group S.p.A.
Kubota Corporation

SECTION 6

Global Agriculture Machinery Industry Force Field Analysis

Driving Forces
Restraining Forces

SECTION 7

Key Industry Trends

SECTION 8

Key Issues, Challenges & Risk Factors

SECTION 9

Strategic Industry Outlook

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