

Strategy Guide - 2015 - World's 6 Leading Agriculture Equipment Manufacturers - John Deere, CNH, AGCO, CLAAS, SAME Deutz-Fahr, Kubota

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Abstracts

Global Agriculture Industry Driven by Strong Fundamentals, Sustainable Long-Term Growth Drivers & Favorable Macro Trends:

The global agriculture industry is driven by strong fundamentals and has a number of sustainable long-term growth drivers & favorable macro trends led by a rapid growth in world's population projected through the middle of present century. Consequently, the global agriculture industry will need to double its production output by 2050 from the current levels, in order, to match & meet the rate at which world's population is projected to grow. This need to increase global crop production output & enhance efficiency will necessitate & drive increased utilization of mechanized farming, especially, across emerging nations over medium to long term. The continued consolidation of farm sizes across traditional markets, on the contrary, is likely to drive demand for larger agriculture machinery.

Eroding Farm Sector Profitability to Impact Capital Investments & Agriculture Machinery Sales over Near Term:

The near term dynamics for the industry, however, are complex & difficult with the Industry facing significant, near term pressures emanating from record harvest for corn & soyabean across North America, Europe & Latin America regions in 2014 that have led to tumbling of crop prices & have subsequently impacted farm incomes and ultimately demand & purchase decisions for new agriculture machinery. The U.S. net farm income is projected to be at the lowest level since 2010 and contract by 25% year on year to \$97.3 billion for 2014, as against \$129 billion for 2013, as per USDA, despite the surge in livestock receipts for 2014. Additionally, the production expenses in the

U.S. have continued to rise for a fifth straight year in 2014 putting further pressure on profitability.

Further, recent surge in U.S. Dollar against most key global currencies, significant increase in corn planting acreage across key regions globally, ongoing correction in farm land prices in the U.S. & proposed easing of existing ethanol fuel mandates across the U.S. & EU over near term paint a grim near term picture for the industry despite presence of strong, long-term fundamentals & sustainable demand drivers.

Near & Long Term Strategy Focus for Industry OEMs:

Against this backdrop, the report provides comprehensive insights into the Key Strategies & Plans being conceptualized, formulated & implemented by the World's 6 leading agriculture equipment manufacturers with their near term strategy focus being on negotiating the rough patch through optimization of cost base and alignment of industrial base with projected demand levels while they continue to invest towards development of new product platforms, technological innovations & revolutionary technologies besides deepening roots across emerging markets to be able to capitalize on long term growth opportunities effectively.

Report Excerpts: (Additional Strategies & Plans for OEMs available in the report)

Analysis of John Deere's Strategic Product Portfolio Expansion, Growing Focus on Core Business & Optimization of Cost Base.

CNH's Plans to Double Net Income by 2018 and Continued Expansion of Industrial Footprint across Emerging Markets.

Analysis of AGCO's overall Technology Strategy, Plans to Scale up GSI business with increased Diversification to Emerging Markets and Focus on Bolstering Profitability.

Analysis of Kubota's Plans to Expand Industrial Footprint across Traditional Markets, Accelerate Business Development for Upland Farming across Asian markets & Plans for Increased Localization of Mainstay Business Operations.

Analysis of Key Macroeconomic, Technological & Market Trends likely to Shape Industry's Future

Relevance & Usefulness of the Report:

The report provides insights & inputs to be incorporated into the broader strategic planning & decision making processes and will be essential from a competitive analysis standpoint as well.

The report will be useful for:

Strategic Planning, Competitive Assessment & Decision-Making Process

Comprehensive Strategic & Competitive Assessment

Insights into key Business Strategies & Plans being pursued by each key OEM

Gaining a Strategic Perspective on the Business & Strategic Outlook for all key players for 2015

Insights into Current & Emerging Industry Trends & Analysis

Insights into Key Industry Issues, Challenges & Risk Factors

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

Analysis of Forces Driving as well as restraining the Industry & their overall Dynamics

Gaining a Strategic Perspective on the Industry's Strategic Outlook for 2015

For Whom:

This Strategy Guide report will be essential for those associated with and having strategic interest in the Global Agriculture Machinery industry and any of these companies. The report 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 Machinery

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.

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