

Indian Tractor Market – 2011 Edition

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Abstracts

Recovery in industrial performance and fiscal incentives initiated by the government of India during the global slowdown has led to a substantial growth in the overall economy and also agricultural sector. The Indian tractor market is one of the largest markets in the world by volume. The domestic tractor industry is fragmented, characterized by the presence of 13 national players and some regional players. Due to global economic slowdown and cyclical nature of tractor business in India which had a strong relation with monsoons, production of tractors was significantly affected in FY09 and FY08.

The Indian tractor market is primarily a medium HP (Horsepower) market; however, there is a gradual shift towards higher HP segments supported by a number of factors including replacement demand for higher HP tractors in Northern region, increasing use of tractors in non-agricultural applications and the growth in exports which again is a high HP market.

Currently low levels of tractor penetration in India, strong governmental focus on availability of finance for agriculture mechanization tools and on rural development and high irrigation potential will drive the overall growth of the tractor industry. In addition, government initiatives such as the implementation of National Rural Employment Guarantee Act (NREGA) and increased usage in non-agricultural domains such as haulage in construction and infrastructure projects will further increase demand of tractors. Also, many manufacturers are introducing new models of tractors into the market to leverage the growing demand.

Main manufacturers of tractors in India include Mahindra and Mahindra, Escorts, TAFE Ltd, ITL and Eicher. The industry is dominated by Mahindra and Mahindra (M&M) followed by Tractors and Farm Equipments (TAFE), Escorts, L&T-John Deere, and International Tractors Limited.

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