



**Global and China Agricultural Machinery
Industry Report, 2010-2012**

Dec. 2011

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and understand the size and growth rate of any opportunity.

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study.

Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.




Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), China Customs, Wind, Ministry of Agriculture of the People's Republic of China, and CAAMM etc.

Abstract

The report analyzes the overall development of the global and China agricultural machinery and highlights the followings:

-  **Status Quo of Chinese Agricultural Machinery Industry:** covering agricultural machinery subsidy, total amount of agricultural machinery equipment, equipment structure, agricultural mechanization, and agricultural machinery service;
-  **Key Products of Chinese Agricultural Machinery Industry:** including tractors, harvesting machinery, field machinery, agricultural transportation machinery, irrigation and drainage machinery, and controlled environment agricultural machinery;
-  The agricultural machinery equipment, agricultural mechanization, agricultural machinery service and future planning in major provinces and cities (including Shandong, Hebei, Henan, Anhui, Hunan and Jiangsu).

--High Growth of Chinese Agricultural Machinery Industry

In recent years, fueled by the policies such as subsidy for agricultural machinery, the agricultural machinery equipment and mechanization in China have rapidly improved. As of 2010, the total power of agricultural machinery reached 928 million kilowatts, up 35.2% over 2005. The integrated mechanization level hit 52.3%, increasing 14.3 percentage points compared with that in 2006; specifically, the mechanization rate of plowing, sowing and harvesting registered 69.0%, 43.0% and 38.0%, respectively.

In 2011, subsidies for Chinese agricultural machinery increased to RMB17.5 billion and are expected to approximate RMB21 billion in 2012. Therefore, the investment in agricultural machinery and the farmers' confidence in purchasing will further increase. By 2012, the total power of Chinese agricultural machinery will amount to 975 million kilowatts and the integrated mechanization level is likely to register 55.6%.

--Boom of Major Agricultural Machinery Products

Bolstered by the flourishing of agricultural machinery industry in China, agricultural machinery products including tractors and harvesters witnessed mushrooming development. Among them, large and medium-sized tractors presented robust growth, with the output approaching 400,000 sets in 2010. The output of harvesters reached record 801,900 sets in 2010, and the growth is mainly attributable to two aspects. Firstly, the wheat harvester was again included in the subsidized product catalog in 2010 after three years of suspension. Secondly, as the mechanization level of corn and rice harvesting is relatively low, the government has listed corn and rice harvesters as the main subsidy objects, leading to growing demand for them.

--The Industry First Rose in Key Agricultural Provinces

In recent years, the agricultural machinery industry first rose in Shandong, Henan and Hebei, etc. In 2010, the total power of agricultural machinery in these provinces all exceeded 100 million kilowatts. Shandong ranked No.1 with 116 million kilowatts. Breakthroughs were also made in some provinces in terms of agricultural machinery application in corn harvesting and rice planting. With respect to corn harvesting, Shandong became the first to realize full mechanization in corn production. The mechanization rate of corn harvesting in Shandong hit 71.5% in 2010 and is expected to surpass 80% in 2012. And in respect of rice planting, Jiangsu and Hunan took the lead. In 2012, the mechanization rate of rice planting reached 48.0% and 43.5% respectively in these two provinces, far higher than the average level in China.

Additionally, the report also focuses on 6 world-renowned agricultural machinery manufacturers including John Deere, CNH, Kubota and AGCO, as well as 12 key Chinese agricultural machinery enterprises such as YTO Group Corporation and Foton Lovol International Heavy Industry, etc.

The sound development momentum of Chinese agricultural machinery market has attracted a large number of global agricultural machinery enterprises. As of the third quarter of 2011, the world's top 10 agricultural machinery players almost all set up plants or sales offices in China, of which John Deere and AGCO achieved booming development.

John Deere: in May 2011, Harbin Plant, John Deere's seventh production base in China, was established and will mainly engage in the production of large and medium-sized tractors, spraying machines, sowing machines and harvesting equipment. On July 1, 2011, the groundbreaking ceremony was held and the plant is estimated to be put into operation at the end of 2012.

AGCO: in September 2011, AGCO announced that it would further expand its manufacturing operations in China and planned to invest USD300-350 million to expand the existing and planning production bases in the coming three years. Over USD30 million, over USD50 million and USD200 million will be invested in Daqing Plant, Yanzhou Plant and Changzhou Plant separately.

Along with the rising demand for agricultural machinery and the intensifying market competition in China, domestic agricultural machinery manufacturers have increased their investment and R & D efforts one after another.

In H1 2011, **Foton Lovol International Heavy Industry** successfully launched Lovol Harvester GF35 and GF40 with feed quantity of 3.5 kg and 4 kg targeting at Central Plains region as well as Lovol Combine-Harvester GN60 with feed quantity of 6kg targeting at Northeast China. Besides establishing a foothold in Chinese agricultural machinery market, the company will strengthen its presence in overseas market in the future.

1. Agricultural Machinery Industry Development Worldwide

- 1.1 Overview
- 1.2 Major Countries
 - 1.2.1 The United States
 - 1.2.2 Germany
 - 1.2.3 Italy
 - 1.2.4 Japan
 - 1.2.5 Summary

2. Agricultural Machinery Industry Development in China

- 2.1 Policy Environment
- 2.2 Agricultural Machinery Equipment Level
 - 2.2.1 Total Amount
 - 2.2.2 Structure
- 2.3 Agricultural Machinery Mechanization Level
 - 2.3.1 Entering into the Intermediate Stage of Development
 - 2.3.2 Mechanization of Major Grain Crops Production
- 2.4 Agricultural Machinery Services
- 2.5 Industry Operation
 - 2.5.1 Overview
 - 2.5.2 Main Products
 - 2.5.3 Import & Export

3. China's Major Agricultural Machinery Products

- 3.1 Tractor
- 3.2 Harvester
- 3.3 Field Machinery

- 3.4 Agricultural Transport Machinery
- 3.5 Drainage and Irrigation Machinery
- 3.6 Controlled Environment Agricultural Machinery

4. Key Provinces & Municipalities

- 4.1 Shandong
 - 4.1.1 Total Amount of Agricultural Machinery Equipment
 - 4.1.2 Agricultural Mechanization Level
 - 4.1.3 Agricultural Machinery Services
 - 4.1.4 Development Plan
- 4.2 Hebei
- 4.3 Henan
- 4.4 Anhui
- 4.5 Hunan
- 4.6 Jiangsu

5. Key Agricultural Machinery Companies Worldwide

- 5.1 John Deere
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Development in China
- 5.2 CNH
- 5.3 Kubota
- 5.4 AGCO
- 5.5 Claas

- 5.6 Same Deutz-Fahr
- 5.7 Kverneland

6. Key Agricultural Machinery Companies in China

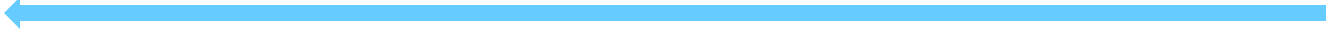
- 6.1 Shandong Shifeng (Group) Co., Ltd.
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Key Projects
 - 6.1.4 Forecast for 2011-2012
- 6.2 YTO Group Corporation
- 6.3 Foton Lovol H.I.
- 6.4 Changfa Group
- 6.5 Shandong Wuzheng (Group) Co., Ltd.
- 6.6 Shandong Changlin Machinery Group Co., Ltd.
- 6.7 Henan Benma Co., Ltd.
- 6.8 Changzhou Dongfeng Agricultural Machinery Group Co., Ltd.
- 6.9 Luoyang Zhongshou Machinery & Equipment Co., Ltd.
- 6.10 Shandong Juming Group
- 6.11 Xinjiang Machinery Research Institute Co., Ltd.
- 6.12 Gifore Agricultural Machinery Chain Co., Ltd.

- Agricultural Mechanization in Major Countries
- Sales of Agricultural Machinery by Product in Germany, 2008
- Export Value of Agricultural Machinery by Destination Country in Germany, 2008
- Output and Sales Volume of Main Agricultural Machinery in Japan, 2009
- Agricultural Machinery Subsidy in China, 2004-2012E
- Latest Policy of Agricultural Machinery Industry in China, 2011
- Total Power of Agricultural Machinery in China, 1978-2012E
- Ownership of Large & Medium-sized Tractors and Support Tools, Combine harvesters in China, 2005-2010
- Agricultural Machinery Power per Hectare of Arable Land in China, 2007-2012E
- Ownership Ratio of Small-size Tractors to Large & Medium-sized Tractors in China, 2001-2011
- General Mechanization Level of China's Crop Plowing, Sowing & Harvesting, 2006-2012E
- Crop Plowing, Sowing & Harvesting Mechanization Level in China, 2006-2011
- General Mechanization Level of Top Three Grain Crops in China, 2007-2010
- Output Value of Agricultural Machinery Industry in China, 2009-2011
- Output of Main Agricultural Machinery Products in China, 2009-2011
- Export Volume & Value of Main Agricultural Machinery Products in China, 2010-2011
- Model Quantity of Large and Medium-sized Tractors Included in Agricultural Machinery Subsidy Catalog, 2009-2011
- Output of Large and Medium-sized Tractors in China, 2003-2012E
- Top5 Provinces & Municipalities by Output of Large and Medium-sized Tractors in China, 2010
- Output of Small-size Tractor in China, 2003-2012E
- Top10 Provinces & Municipalities by Output of Small-size Tractor in China, 2010
- Harvesting Mechanization Level in China, 1990-2010
- Output of Harvester in China, 2003-2012E
- Output of Field Machinery in China, 2003-2012E
- Top Ten Provinces & Municipalities by Field Machinery Output in China, 2010

- Output and Sales Volume of Low-speed Goods Vehicle in China, 2007-2011
- Output and Sales Volume of Tri-wheel Vehicle in China, 2007-2011
- Output and Shares of Top 10 Low-speed Goods Vehicle Companies in China, 2009-2011
- Output and Shares of Top 10 Tri-wheel Vehicle Companies in China, 2009-2011
- Regional Competition Pattern of Low-speed Goods Vehicle and Tri-wheel Vehicle in China by Output, H1 2011
- Sales Volume and Export Volume of Agricultural Water Pump in China, 2007-2010
- Domestic Sales and Export Value of Agricultural Water Pump in China, 2007-2012E
- Total Power & Value of Agricultural Machinery in Shandong, 2003-2012E
- Ownership of Corn Combine Harvester and Mechanized Harvesting Rate of Corn in Shandong, 2006-2011
- General Mechanization Level of Crop Plowing, Sowing & Harvesting in Shandong, 2006-2012E
- Total Output Value & Added Value of Agricultural Machinery Service in Shandong, 2006-2010
- Total Power of Agricultural Machinery in Hebei, 2005-2012E
- Ownership of Major Agricultural Machinery Products in Hebei, 2007-2010
- General Mechanization Level of Plowing, Sowing & Harvesting in Hebei, 2008-2012E
- Total Power of Agricultural Machinery in Henan, 2005-2012E
- Ownership of Tractor in Henan, 2005-2010
- Ownership of Major Agricultural Machinery Products in Henan, 2005-2010
- General Mechanization Level of Plowing, Sowing & Harvesting in Henan, 2005-2012E
- Agricultural Machinery Investment in Anhui, 2003-2011
- Total Power of Agricultural Machinery in Anhui, 2003-2012E
- Ownership of Major Agricultural Machinery Products in Anhui, 2006-2010
- General Mechanization Level of Plowing, Sowing & Harvesting in Anhui, 2007-2012E
- Operating Revenue of Agricultural Machinery in Anhui, 2003-2010
- Total Power of Agricultural Machinery in Hunan, 2006-2012E

- General Mechanization Level of Rice Plowing, Sowing & Harvesting in Hunan, 2007-2012E
- Total Power of Agricultural Machinery in Jiangsu, 2005-2012E
- Ownership of Major Agricultural Machinery Products in Jiangsu, 2007-2010
- General Mechanization Level of Crop Production in Jiangsu, 2007-2012E
- Rice Planting Mechanization Level in Jiangsu, 2005-2010
- Net Sales & Net Income of John Deere, FY2006-FY2011
- Net Sales of John Deere by Business, FY2007-FY2011
- Net Sales and Net Income of CNH, 2006-2011
- Net Sales of CNH by Business, 2007-2011
- Agricultural Equipment Net Sales of CNH by Region, 2007-2010
- Sales of SNH, 2005-2009
- Operating Revenue and Net Income of Kubota, FY2007-FY2012
- Operating Revenue of Kubota by Region, FY2009-FY2012
- Operating Revenue of Kubota by Business, FY2010-FY2012
- Sales and YoY Growth of Kubota Suzhou, 2005-2011
- Net Sales and Net Income of AGCO, 2006-2011
- Net Sales Breakdown of AGCO by Product, 2010
- Net Sales YOY Growth of AGCO Tractor and Harvester by Region, 2010-2011
- Net Sales of AGCO by Region, 2008-2011
- Net Sales & Net Income of Claas, FY2006-FY2010
- Net Sales of Claas by Business, FY2009-FY2010
- Net Sales Breakdown of Claas by Region, FY2010
- Net Sales & Net Income of Same Deutz-Fahr, 2007-2010
- Net Sales of Same Deutz-Fahr by Product, 2008-2010
- Tractor Market Demand Y-o-Y Growth of Same Deutz-Fahr by Region, 2009

- Net Sales of Same Deutz-Fahr Tractor by Brand, 2008-2010
- Net Sales of Same Deutz-Fahr Tractor by Horsepower, 2007-2010
- Operating Revenue and Net Income of Kverneland, 2006-2011
- Sales of Kverneland by Product, 2008-2011
- Operating Revenue of Kverneland by Region, 2008-2011
- Operating Revenue and Profit & Tax of Shifeng Group, 2006-2010
- Ten Major Projects of Shifeng Group, 2011
- Vehicle Output, Operating Revenue and Profit & Tax of Shifeng Group, 2011-2012E
- Operating Revenue of YTO Group, 2007-2011
- Operating Revenue and Gross Margin of YTO Group by Business, 2008-2010
- Sales Volume and Market Share of Main Agricultural Machinery Products of YTO Group, 2010-2011
- Operating Revenue and Net Income of First Tractor, 2007-2011
- Operating Revenue of YTO by Business, 2009-2010
- Sales Volume of Main Agricultural Machinery Products of First Tractor, 2009-2011
- Sales and Y-o-Y Growth of Foton Lovol H.I., 2006-2011
- Operating Revenue of Changfa Group, 2007-2011
- Sales of Wuzheng Group, 2006-2010
- Sales and Total Profit of Changlin Group, 2004-2010
- Sales and Y-o-Y Growth of Dongfeng Agricultural Machinery, 2006-2011
- Sales and Y-o-Y Growth of Shandong Juming Group, 2005-2010
- Sales and Net income of Xinjiang Machinery Research Institute, 2007-2011
- Sales of Xinjiang Machinery Research Institute by Product, 2008-2010
- Sales Volume of Main Agricultural Machinery Products of Xinjiang Machinery Research Institute, 2008-2011
- Production Capacity of Agricultural Equipment of Xinjiang Machinery Research Institute, 2007-2012E
- Sales Volume of Corn Harvesting Machinery of Xinjiang Machinery Research Institute, 2008-2012E

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- Operating Revenue and Net Income of Gifore, 2006-2011
 - Direct-sale Store Quantity of Gifore, 2006-2011
 - Sales Breakdown of Gifore by Region, 2010
 - Sales and Gross Margin of Gifore by Product, 2009-2011
 - Sales and Market Share of Gifore, 2010-2012E

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