



AUGUST

2014

Asia Pacific Agricultural Equipment Industry Outlook to 2018

- Expanding Market for Large Sized Tractors

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EXECUTIVE SUMMARY

The industry research report titled, “**Asia Pacific Agricultural Equipment Industry Outlook to 2018 – Expanding Market for Large Sized Tractors**” provides comprehensive analysis of market size of agricultural equipments such as tractors (small and medium-large tractors), combine harvesters, rice transplanters, threshers, tillers, balers, rotavators and cotton processing machinery in Asia Pacific, India, China, Japan, Australia and other emerging countries such as South Korea, Thailand and Vietnam. The report provides market share analysis of major players in agricultural equipment industry in Japan, China, Australia and India along with the company profiles. The publication provides trends and development, future outlook and prospects of farm equipments production and sales along with the cause and effect relationship of several macro-economic and industry factors in several countries.

Mechanization of agricultural process is advancing steadily in Asia Pacific. In 2013, it was observed that Japan had the highest level of mechanization of 7 hp/ha, followed by South Korea, China, Thailand and Vietnam with 4.11 hp/ha, 4.10 hp/ha, 1.60 hp/ha and 1.56 hp/ha respectively. The moderately mechanized market was constituted by Pakistan and India with 1.02 hp/ha and 1.0 hp/ha. China, India, Japan and Australia contribute the largest to the development of the agricultural equipment market in Asia Pacific. From the total demand of agricultural equipments in the world, Asia accounts for nearly half of the requirement. The revenue generated by the agricultural equipment industry in Asia in 2013 was USD ~ million, registering a CAGR of 16.1% during 2008-2013.

Although Japan has the highest level of mechanization amongst the Asian countries, the regional market for agricultural equipments is largely driven by China and India due to their large area of agricultural land and low level of mechanization. China, the most industrialized economy in Asia has achieved rapid strides in automation. The self-sufficiency drive in China has led the country into increasing domestic production of several commodities. The agricultural equipment market in the country is by far the largest contributor to the development of the overall Asian market for the same.

Australian farming practices are highly mechanized and the country is a developed market for agricultural machinery. Other countries such as Thailand and Vietnam also hold enormous potential for the farm machinery industry.

Tractors are the most important machinery from the several types of agricultural equipment being used today. Due to the varied functions, both in agricultural and non-agricultural purposes, tractors have become the most sought after machinery amongst farmers. Combine harvesters are also being increasingly regarded as significantly useful, although the high cost of the equipment inhibits its sales in Asia. Additionally, since rice is by far the most important crop throughout Asia, rice transplanters are a promising segment in the regional agricultural equipment market.

The existing and improving level of infrastructure in the Asian countries, together with political support, alternative sales channels and ease of access to different forms of credit, are creating stable and suitable conditions for equipment manufacturers to expand their investments in the farm machinery market in Asia.

John Deere, Case New Holland, AGCO Corporation are major companies in the Asia Pacific farm equipment industry with major market share in tractors, combine harvesters, cotton harvesters, balers, mechanical planters and others.

The future outlook for the agricultural equipment industry in Asia is exceedingly promising. The region will continue contributing the largest share to the global market for agricultural machinery in the future. While China and India will be the fastest growing markets, the demand for agricultural machinery in the developed markets of Japan and Australia will witness stagnancy. Smaller countries such as Thailand and Vietnam that are involved in intensive agriculture will also increase their usage of farm equipments in the near future. The Asian agricultural equipment industry is projected to reach revenue of USD 174 billion in 2018 at a CAGR of 14.6% during 2013-2018.

KEY TOPICS COVERED IN THE REPORT

- The market size of Asia agricultural equipment industry in terms of revenue.
- Asian market segmentation by geographies covering China, India, Japan and Australia.
- Growth drivers and challenges in Asia agricultural equipment market.
- Future outlook and projections of agricultural equipment market in Asia.
- China agricultural equipment market size, segmentation, export import scenario, trends, growth drivers and issues, market share of major companies in the industry.
- India agricultural equipment market size, segmentation, pricing scenario, trends and issues, market share of major companies in different types of equipment.
- Government regulations and support schemes in China and India agricultural equipment industry.
- Japan agricultural equipment market size, segmentation, drivers and issues, market share of major companies in the industry.
- Australia agricultural equipment market size, segmentation, drivers and issues, market share of major companies in different types of equipment.
- Competitive landscape of major companies operating in China, India and Japan agricultural equipment industry
- Future Outlook and macroeconomic factors in agricultural equipment industry in China, India, Japan and Australia
- Snapshot of other countries (Thailand, Vietnam, South Korea) in Asia agricultural equipment industry