

Agricultural Equipment Groups - World

Market Analysis – 2016-2021 Trends – Corporate Strategies

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Exclusive extracts from this 213-page-long report:

- What is the business?

Agricultural machinery is primarily used by farmers or by contractors for the production of food (grains, livestock, fresh produce and other crops such as coffee) and thus the market depends heavily on the health of farms and their income. The products that come into the scope are primarily tractors, combine harvesters, and other equipment for planting, seeding, haying, ploughing and cultivating. [...]

- Who are the key players?

Leading agricultural equipment makers are mainly headquartered in mature economies in Western Europe, the US or Japan. These companies design and market extensive product ranges (from premium agricultural machinery to supporting activities) on a global basis. Emerging market firms have joined the market but have primarily focused on low-priced volume sales. [...]

Companies analysed in the report include: **John Deere, CNH, Kubota, Agco, Claas, Mahindra & Mahindra, SDF, Bucher/Kuhn, Iseki, First Tractor and Buhler.**

- How intense is competition?

The competitive intensity of the agricultural machinery industry is moderate. Global industry consolidation seen since the 1980s has resulted in the dominance of a handful of full-range multinational companies. Besides cashing in on developed market demand, global players with huge financial clout have been expanding in emerging markets via acquisitions and new dealership openings, on top of expanding local production capacities. Although they face competition from small, local players, global agricultural equipment manufacturers are unmatched in terms of technological product features. Nonetheless it is true that local players (such as First Tractor in China, Mahindra in India, and Agrale in Brazil, etc.) boast a much denser distribution network, therefore managing to capture the bulk of demand in basic market segments. [...]

- What are the main markets?

Demand varies according to regional specificities such as farm income levels, the size of farms, climate conditions, arable land surface as well as planted crops, among other things. In developed countries, demand is for large, state-of-the-art equipment whereas in developing countries demand revolves around more basic machinery. [...]

To find out more on the sector and its leading corporations, please find enclosed the order form to obtain this exclusive report by Xerfi Global.

Kathryn McFarland
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