

**2007-2008 年中国农业机械
行业研究与市场预测报告**

China Agricultural Machinery
Industry Report, 2007-2008

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摘要

2007 年中国农业机械化的发展水平, 已经由初级阶段跨入了中级阶段, 标志着中国农机化事业发展进入了一个新的历史阶段。到 2007 年末, 中国耕种收综合机械化水平已达 41%, 中国农业已进入增机减人(转人、育人)发展现代农业的新时代。

图表: 2007 年中国农机装备总量

	2007 年	同比增加
农机工业总产值	1500 亿元	15%
农机总动力	7.5 亿千瓦	3.30%
拖拉机保有量	1834.1 万台	6.12%
大中型拖拉机保有量	183.9 万台	9.70%
联合收割机保有量	60.8 万台	7.10%
水稻插秧机保有量	14.4 万台	28.60%

资料来源: 中国农业机械工业协会

2007 年, 中国机械化耕地、播种和收获总面积达到 24.3 亿亩, 机械化水平大幅提高, 农业综合生产能力明显增强。在小麦、水稻和玉米三大粮食作物中, 小麦机播和机收水平平均超过 81%, 基本实现了生产全程机械化, 水稻机械化栽植和收获水平分别为 11.2%和 44.1%, 玉米机播和机收水平分别达到 58%和 6.8%。

图表: 2007 年中国农田作业机械化水平

	2007 年	同比增加
耕地	57%	9.40%
播种	33%	1.85%
收获	27%	7.14%
全国耕种收综合机械化水平	41%	7.89%

资料来源: 中国农业机械工业协会

2007 年中国农业机械进出口贸易实现了持续稳定增长。据海关统计, 各类农机(含内燃机和排灌机械)进出口额 190.09 亿美元, 同比增长 39.37%, 对外贸易顺差 14.39 亿美元。预计 2008 年农机进出口贸易仍将保持稳定发展态势。

2008 年中国农机工业将继续保持持续、稳定、快速、协调发展的态势, 其中工业总产值将同比增长 10%~15%, 达到 1650 亿~1700 亿元, 大中马力拖拉机产量将达到 20 万~22 万台, 联合收割机产量将达到 7 万~8 万台。

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Title	China Agricultural Machinery Industry Report, 2007-2008	Pages	53																																				
Price	PDF USD \$ 1,800 Hard Copy USD \$ 1,700 Enterprise wide USD \$2,700	Release Date	Jun/2008																																				
Abstract	<p>In 2007, China's development of agricultural mechanization entered the intermediate stage from the initial stage, indicating that China's agricultural mechanization has entered a new historical phase. By the end of 2007, China's integrated mechanization level of plowing, seeding and harvesting has reached 41%, demonstrating that China has moved into a new era of developing modern agriculture through increasing agricultural machinery and reducing labor force.</p> <p style="text-align: center;">Total Quantity of China Agricultural Machinery in 2007</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th></th> <th>2007</th> <th>Growth Rate</th> </tr> </thead> <tbody> <tr> <td>Total Output Value of Agricultural Machinery</td> <td>CNY150 billion</td> <td>+15%</td> </tr> <tr> <td>Gross Power of Agricultural Machinery</td> <td>750 million KW</td> <td>+3.30%</td> </tr> <tr> <td>Total Number of Tractors</td> <td>18.341 million units</td> <td>+6.12%</td> </tr> <tr> <td>Total Number of Large- & Medium-sized Tractors</td> <td>1.839 million units</td> <td>+9.70%</td> </tr> <tr> <td>Total Number of Combine Harvesters</td> <td>608,000 units</td> <td>+7.10%</td> </tr> <tr> <td>Total Number of Paddy Transplanters</td> <td>144,000 sets</td> <td>+28.60%</td> </tr> </tbody> </table> <p style="text-align: center;">Source: China Association of Agricultural Machinery Manufacturers</p> <p>In 2007, China's total area plowed, sown and harvested by machines reached 2.43 billion mu (Chinese unit of area, 1 mu = 0.165 acre). China's agricultural mechanization level had a big jump and its integrated agricultural production capability had a significant improvement in the past year. Among the three major grain crops: wheat, paddy and corn, more than 81% of wheat was sown and harvested by machine averagely, showing a full production mechanization achieved basically; 11.2% of paddy was sown and 44.1% of paddy was harvested by machine respectively; and 58% of corn was sown and 6.8% of corn was harvested by machine respectively.</p> <p style="text-align: center;">Mechanization Level of Farm Operation in China 2007</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th></th> <th>2007</th> <th>Growth Rate</th> </tr> </thead> <tbody> <tr> <td>Plowing</td> <td>57%</td> <td>9.40%</td> </tr> <tr> <td>Seeding</td> <td>33%</td> <td>1.85%</td> </tr> <tr> <td>Harvesting</td> <td>27%</td> <td>7.14%</td> </tr> <tr> <td>Integrated Mechanization Level of plowing, seeding and harvesting</td> <td>41%</td> <td>7.89%</td> </tr> </tbody> </table> <p style="text-align: center;">Source: China Association of Agricultural Machinery Manufacturers</p>				2007	Growth Rate	Total Output Value of Agricultural Machinery	CNY150 billion	+15%	Gross Power of Agricultural Machinery	750 million KW	+3.30%	Total Number of Tractors	18.341 million units	+6.12%	Total Number of Large- & Medium-sized Tractors	1.839 million units	+9.70%	Total Number of Combine Harvesters	608,000 units	+7.10%	Total Number of Paddy Transplanters	144,000 sets	+28.60%		2007	Growth Rate	Plowing	57%	9.40%	Seeding	33%	1.85%	Harvesting	27%	7.14%	Integrated Mechanization Level of plowing, seeding and harvesting	41%	7.89%
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	<p>In 2007, China had a continuous and stable growth in import and export of agricultural machinery. According to the statistics from the General Administration of Customs, China's import and export value of agricultural machinery, including internal-combustion engine and irrigation & drainage machinery, was US\$19.01 billion, up 39.37% year-on-year, with a trade surplus of US\$1.439 billion posted in the year. It is forecasted that in 2008, China will continue to maintain a momentum of stable growth in import and export of agricultural machinery.</p> <p>In 2008, China agricultural machinery industry will keep the trends of a sustained, steady, fast and harmonious development and its total output value will increase by 10%-15% year on year to CNY165-170 billion. The output of large- and medium-sized tractors will reach 200,000-220,000 units and that of combine harvesters will amount to 70,000-80,000 units.</p>
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