

MECHANIZATION OF AGRICULTURE

MARKET DYNAMICS:

CHINA, INDIA, SRI LANKA

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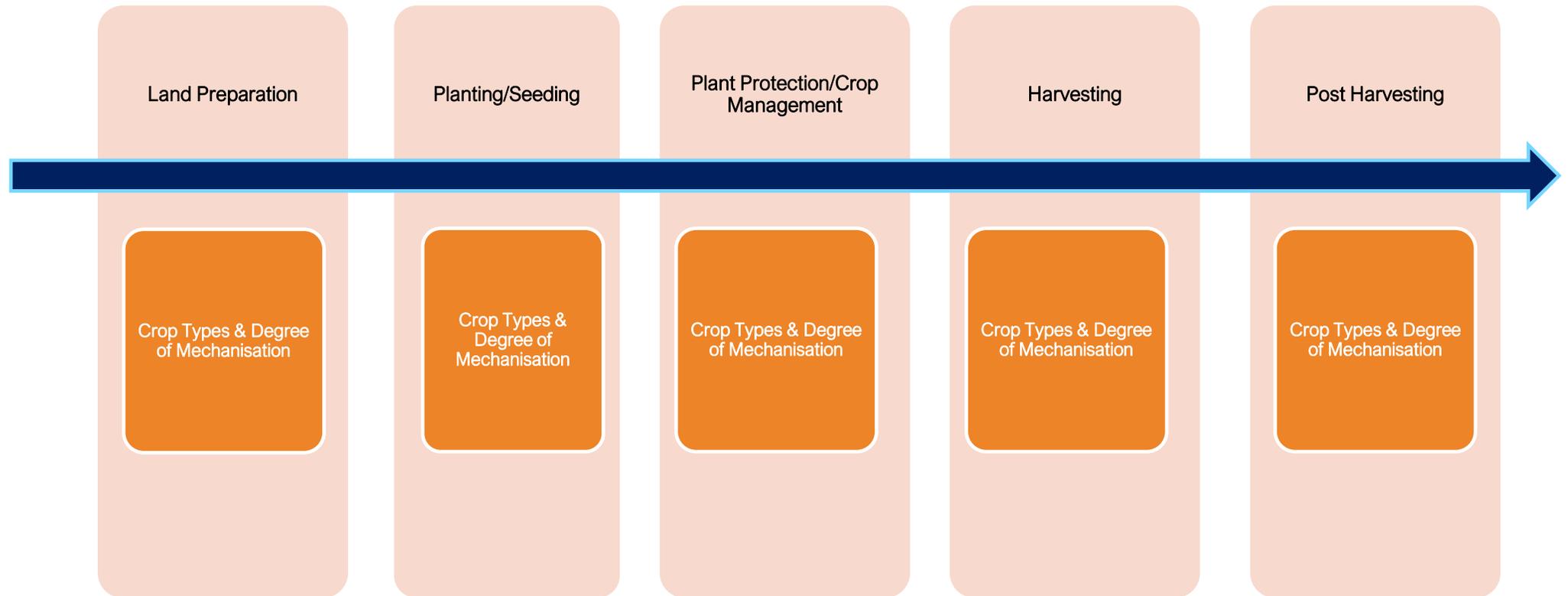
THAILAND



STUDY

- Purpose
 - To gain rich insights into market dynamics of the selected countries, that will benefit members in producing/sourcing appropriate machinery primarily
- Objectives
 - Analyse the structure and dynamics of the market
 - Assess the current demand for farm machinery by application
 - evaluate the unmet demand and future trends

SCOPE OF THE STUDY: MECHANIZATION OPPORTUNITIES & CHALLENGES ACROSS THE PROCESS





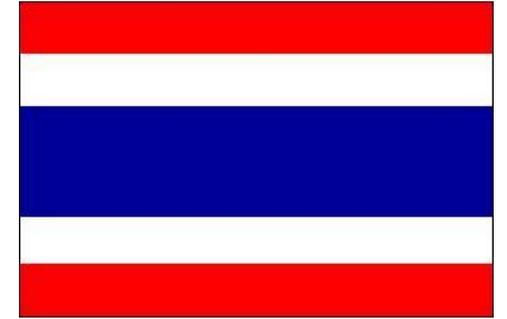
China



India



Sri Lanka



Thailand

OVERALL FINDINGS

FACTORS DRIVING DEMAND FOR MECHANIZATION

- Growth in food production/agricultural activities
- Government initiatives
- New generation shying away from traditional agriculture – promotes mechanisation
- Subsidies for mechanisation
 - Boon in China & India
 - Places the burden on the end-users in Sri Lanka & Thailand
- Promotion of 'Custom Hiring Centers' – The Indian Government initiative as well as in China

MAJOR CHALLENGES

- Three major constraints
 - Fragmented and marginalizing land holding
 - Cost of financing
 - Labour shortage/migration
- Other issues
 - Sustainability Issues
 - Environment friendly, emission issues
 - Gender friendly machinery (Women)
 - Requires more attention

OPPORTUNITIES

- Applications
 - Bed making, bund preparation, Land levelling
 - Seeding & Planting
 - Crop management
 - Harvesting
 - Post harvest: Produce drying, straw & residual treatment
- Crops
 - Paddy, Corn, Sugarcane, Cassava, Pulses & Seeds, Yams, Vegetables

RECOMMENDATIONS

- Supply Chain network
 - Closer dialog between stakeholders
 - Reduce gap between product design and application
 - Transfer new technology in a user-friendly manner to the farmer
 - Information sharing
 - Gender (Women) friendly product development
 - Moving final assembly in proximity to markets
- Cost effective financing mechanism

RECOMMENDATIONS

- Feasibility of establishing custom hiring centers
- Markets & marketing
 - Deeper understanding of market dynamics and information flow
 - Standardised spare parts
 - After-sales-service, reliability and adaptability
 - Training & capacity building of channel partners

FUTURE

- CLIMATE SMART FARMING
(CONSERVATION AGRICULTURE)
- EMPOWERMENT OF YOUTH AND
WOMEN FARMERS
- PROMOTING AGRI ENTERPRISES
vs SUBSISTENCE FARMING
- CREATING AGRIPRENEURS!

Machines with appropriate technology and that are geographically suitable

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THANK
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