

Global Agricultural Machinery Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G5F5AE1DEC91EN.html>

Date: January 2026

Pages: 157

Price: US\$ 4,480.00 (Single User License)

ID: G5F5AE1DEC91EN

Abstracts

The global Agricultural Machinery market size is expected to reach \$ 199610 million by 2032, rising at a market growth of 4.7% CAGR during the forecast period (2026-2032).

Agricultural machinery encompasses a wide range of mechanical devices designed to aid in various farming operations. These machines are pivotal in enhancing productivity, reducing labor costs, and ensuring timely completion of agricultural tasks. The primary categories of agricultural machinery include tractors, harvesters, spraying equipment, planting equipment, hay and forage equipment, and other specialized tools. Tractors serve as the backbone of mechanized farming, providing the necessary power to operate various implements. Harvesters are essential for efficiently gathering crops, minimizing losses, and reducing the time required for harvesting. Spraying equipment ensures the effective application of pesticides and fertilizers, safeguarding crop health. Planting equipment facilitates precise sowing of seeds, optimizing crop yields. Hay and forage equipment is crucial for livestock farming, aiding in the collection and processing of feed.

The leading manufacturers include: John Deere, CNH Industrial (including Case IH and New Holland), Kubota, AGCO, Claas, etc. The top 5 companies account for about 50% of the market share.

The agricultural machinery market can be broadly categorized by function into tractors, harvesters, spraying equipment, planting equipment, hay and forage equipment, and other specialized machines. Among these, tractors represent the largest and most important category, commanding approximately 55% of the global agricultural machinery market. Tractors are the cornerstone of modern mechanized agriculture due to their high versatility, power, and adaptability to a range of field tasks. Harvesters,

which support the efficient gathering of crops, are crucial in minimizing harvest loss and labor costs. Spraying equipment is used in crop protection, enabling precision application of pesticides and fertilizers. Planting equipment ensures accurate seed distribution and planting depth, which is key to improving yield. Hay and forage equipment is critical in livestock farming, supporting feed collection and processing.

In terms of application, agricultural machinery is primarily used in crop farming, forestry, and horticulture. Crop farming is by far the dominant segment, accounting for around 73% of global application share. This is driven by the large-scale cultivation of staple and cash crops, where mechanization has proven to significantly boost output and reduce the reliance on manual labor. Forestry applications include equipment for land clearing, logging, and timber transportation. Horticulture, including fruit and vegetable farming, increasingly utilizes compact, specialized machinery suitable for greenhouse and orchard operations.

Geographically, the Asia-Pacific region is the largest consumer market for agricultural machinery, contributing to approximately 44% of the global revenue. Countries such as China and India are key contributors to this demand, supported by large agricultural land bases, growing population, and active government initiatives aimed at agricultural modernization. The need to increase farm productivity, combined with policy-driven subsidies and mechanization programs, has accelerated the adoption of tractors, harvesters, and related equipment. As a result, the Asia-Pacific market continues to lead global demand, serving as a hub of both production and consumption.

Several key factors are driving the growth of the agricultural machinery market. The increasing global population requires higher food output, pushing farmers to invest in efficient technologies. A shrinking rural labor force and rising labor costs in many countries make mechanization a necessary alternative. Furthermore, agricultural machinery has benefited from the wave of digital transformation. Innovations such as GPS-guided tractors, drone-based spraying systems, automated harvesters, and AI-powered crop monitoring tools are enhancing productivity and reducing waste. Farmers are increasingly embracing precision agriculture techniques, and agricultural machinery plays an instrumental role in delivering these practices.

However, the market is not without its challenges. The high initial investment required for modern agricultural machinery can be a major barrier for small and marginal farmers. Even with government subsidies, affordability remains a key concern in many developing regions. Additionally, machinery requires skilled operation and regular maintenance, which is not always readily available in remote areas. Infrastructural

issues such as fragmented land plots, poor road access, and lack of electricity further complicate machinery adoption, particularly for larger and more advanced equipment.

In conclusion, the global agricultural machinery market is set for continued expansion, driven by the need for food security, efficiency, and sustainability. The dominance of tractors and crop-related equipment is expected to persist, particularly in high-growth regions such as Asia-Pacific. To meet the evolving demands of the market, manufacturers must focus on producing cost-effective, adaptable, and technologically advanced equipment. Investments in local after-sales support, farmer training, and flexible financing options will also be critical to ensuring the widespread adoption of agricultural machinery. As the industry embraces smart farming technologies and sustainable solutions, agricultural machinery will remain a pillar of global food systems for decades to come.

This report studies the global Agricultural Machinery demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Agricultural Machinery, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Agricultural Machinery that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Agricultural Machinery total market, 2021-2032, (USD Million)

Global Agricultural Machinery total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Agricultural Machinery total market, key domestic companies, and share, (USD Million)

Global Agricultural Machinery revenue by player, revenue and market share 2021-2026, (USD Million)

Global Agricultural Machinery total market by Type, CAGR, 2021-2032, (USD Million)

Global Agricultural Machinery total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Agricultural Machinery market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include John Deere, CNH Industrial (Case IH and New Holland), Kubota,

AGCO, Claas, Mahindra, Yanmar, LOVOL, WORLD, SDF, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Agricultural Machinery market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Agricultural Machinery Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Agricultural Machinery Market, Segmentation by Type:

Tractors

Harvesters

Spraying Equipment

Planting Equipment

Hay & Forage Equipment

Others

Global Agricultural Machinery Market, Segmentation by Application:

Crops

Forestry

Horticulture

Others

Companies Profiled:

John Deere

CNH Industrial (Case IH and New Holland)

Kubota

AGCO

Claas

Mahindra

Yanmar

LOVOL

WORLD

SDF

JCB

YTO Group

Tractors and Farm Equipment (TAFE)

ISEKI

Exel Industries

Escorts Kubota

Wuzheng

Horsch Maschinen

Rostselmash

Dongfeng Farm

Lemken

Shandong Shifeng

Zoomlion

Key Questions Answered

1. How big is the global Agricultural Machinery market?
2. What is the demand of the global Agricultural Machinery market?
3. What is the year over year growth of the global Agricultural Machinery market?
4. What is the total value of the global Agricultural Machinery market?
5. Who are the Major Players in the global Agricultural Machinery market?
6. What are the growth factors driving the market demand?

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