

Agriculture Equipment Market Size, Share, Trends and Forecast by Equipment Type, Application, Sales Channel, and Region, 2026-2034

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Abstracts

The global agriculture equipment market size was valued at USD 188.8 Billion in 2025. Looking forward, IMARC Group estimates the market to reach USD 264.6 Billion by 2034, exhibiting a CAGR of 3.82% from 2026-2034. Asia Pacific currently dominates the market, holding a market share of over 36.8% in 2025. The market in the region is driven by rising mechanization, growing food demand due to population growth, government subsidies, and increasing adoption of advanced machinery.

The global agriculture equipment market is primarily driven by increasing awareness among farmers regarding the efficiency and productivity gains achieved through modern agricultural machinery. This trend is complemented by the rising global demand for high-quality, sustainably produced food, necessitating advanced farming solutions. A key driver reshaping the industry is the integration of cutting-edge technologies such as autonomous tractors, drones, and AI-powered robotics. These innovations enhance precision in farming operations and help reduce production costs, making them highly attractive to farmers.

The United States remains one of the most prominent markets for agriculture equipment, driven by robust technological advancements and a strong focus on sustainability. Manufacturers in the United States are increasingly developing machinery and tools designed to reduce the environmental impact of farming practices, aligning with the growing emphasis on eco-friendly and efficient agricultural solutions. For instance, in November 2024, John Deere released an update for their Operations Center, a mobile and web-based management tool that helps farmers track equipment and crop data. The software enables farmers to track the rainfall received by each field, monitor seeding quality variation and productivity based on the used equipment, and

analyze historical data to enhance crop management.

AGRICULTURE EQUIPMENT MARKET TRENDS:

Low Availability of Skilled Labor

The declining arable land acreage, low availability of skilled labor, and increasing food demand globally are some of the key factors propelling the adoption of agricultural machinery for efficient farming operations. Moreover, with elevating levels of urbanization, urban areas are providing a plethora of job opportunities and attracting rural households to migrate. This shift is resulting in a shortage of farm labor in various regions. For instance, according to the survey by the Centre for Monitoring Indian Economy (CMIE), in India, the number of people employed in the agriculture sector dropped from 158.2 million in 2022 to 147.9 million in 2023. Looking ahead, the Indian Council of Food and Agriculture projects a 25.7% decline in the percentage of agriculture workers in India by 2050. In North America and Europe, the dependence on seasonal immigrant workers has emerged due to a decrease in domestic labor availability. This dependence has led to an increase in the cost of farm labor, prompting farmers to turn to cost-effective agricultural machinery as a cost-saving measure.

Emergence of Precision Agriculture

The rising adoption of precision agriculture practices is catalyzing the agriculture equipment market growth. Precision agriculture involves the use of GPS-guided tractors, drones, and sensors for monitoring soil health, moisture levels, and crop conditions. Moreover, various manufacturers are introducing technologically advanced equipment to improve agriculture practices. Furthermore, the adoption of smart agriculture equipment is increasing, particularly in emerging markets. In line with this, Deere & Co. joined forces with Sweden-based Delaval on the Milk Sustainability Center and Norway-based Yara to develop digital tools for precision agriculture in October 2023. The aim of the partnerships is to aid farmers monitor livestock and fertilizer information, enabling them to make smarter and eco-friendly business decisions.

Mechanization of Farms

The mechanization of farms plays a crucial role in sustainable agriculture. Agriculture equipment, including tractors, harvesters, and other cultivation equipment, assists in numerous farming activities. According to a 2022 report by PRS India, 47% of agricultural operations in India were mechanized. It is estimated that achieving 75–80%

mechanization in India would take approximately 25 years. In other developing countries, including China and Brazil, agricultural operations were 60% and 75% mechanized, respectively. As a result, developing regions are emerging as key growth segments for manufacturers. Moreover, since farmers are gradually becoming tech-savvy, and the adoption of GPS software products and tractors equipped with telematics is anticipated to spur agriculture equipment sales.

AGRICULTURE EQUIPMENT INDUSTRY SEGMENTATION:

IMARC Group provides an analysis of the key trends in each segment of the global agriculture equipment market, along with forecast at the global, regional, and country levels from 2026-2034. The market has been categorized based on equipment type, application, and sales channel.

Analysis by Equipment Type:

Agriculture Tractor

Harvesting Equipment

Irrigation and Crop Processing Equipment

Agriculture Spraying and Handling Equipment

Soil Preparation and Cultivation Equipment

Others

Agriculture tractors account for 35.9% of the global market share, representing the leading equipment type. Tractors play a crucial role in agriculture, serving as the backbone of modern farming operations. Moreover, various key market players are increasingly investing in research and development activities to launch technologically advanced tractors in the market. For instance, in June 2023, Mahindra & Mahindra Ltd launched India's new Sarpanch Plus Tractor series, which offers a higher maximum torque, a 2 HP (1.49 kW) increase in power, and back-up torque to cover more ground quickly. Similarly, Sonalika Tractors has launched Tiger Electric, a field-ready electric tractor for the domestic market.

Analysis by Application:

Land Development

Threshing and Harvesting

Plant Protection

After Agro Processing

Land development currently exhibits a clear dominance in the market, holding a share of 26.7%. As per data by the Food and Agriculture Organization, the total area under agricultural land was 4,781 million hectares globally. This represents more than 33% of the available land area worldwide. Consequently, land development has a critical role in preparing soil for cultivation, leveling fields, and enhancing overall agricultural efficiency. This segment benefits from the growing adoption of advanced machinery, such as tractors and tillers, to improve land productivity. Additionally, increasing mechanization in emerging economies further drives demand for land development equipment.

Analysis by Sales Channel:

Original Equipment Manufacturers (OEM)

Aftermarket

Original equipment manufacturers (OEM) hold the largest market share. OEMs provide high-quality, reliable machinery and components directly to farmers and agricultural businesses. OEMs are responsible for designing and manufacturing equipment that meets specific quality standards. Farmers are heavily dependent on this equipment for their daily operations, so durability, reliability, and efficiency are crucial. As a result, various key market players are involved in merger and acquisition activities to expand and offer improved agricultural machinery and equipment.

Regional Analysis:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia Pacific currently dominates the global market, with a significant 36.8% share of the global market. China is one of the leading producers of farming equipment and holds a major share of the market in the Asia Pacific. According to the National Bureau of Statistics of China, the country produced 5,253,595 large and medium-sized tractors in 2022. Moreover, the shortage of skilled labor, rising agricultural labor costs, and government initiatives for farm mechanization are projected to drive market expansion in the long run in the country. In recent years, Japan has also faced challenges related to the increasing area of abandoned farmland. Therefore, mechanization of agriculture is becoming essential for Japan to overcome the shortage of farm labor. Besides this, India produces a massive volume of tractors and exports tractors globally. Also, the production and sales volume of key players in the Indian market are growing, which indicates that the tractor market in India is growing.

KEY REGIONAL TAKEAWAYS:

NORTH AMERICA AGRICULTURE EQUIPMENT MARKET ANALYSIS

The agriculture equipment market in North America is primarily driven by the increasing adoption of advanced technologies such as precision farming, GPS-enabled equipment, and automation to enhance productivity and efficiency. For instance, according to the USDA, over the past 20 years, U.S. farms have substantially increased their adoption of precision agriculture, and numerous precision technologies are now widespread. For instance, guidance autosteering systems on tractors, harvesters, and other equipment were used by 52% of midsize farms and 70% of large-scale crop-producing farms in 2023—up from adoption rates in the single digits in the early 2000s. Rising demand for high-yield crops, driven by a growing population and expanding food consumption, has fueled investments in modern farming machinery. Additionally, government subsidies and financial support programs for agricultural mechanization encourage farmers to upgrade their equipment. The region's focus on sustainable farming practices and the integration of energy-efficient machinery also play a crucial role in propelling market growth.

UNITED STATES AGRICULTURE EQUIPMENT MARKET ANALYSIS

The United States accounted for 77.80% share of the agriculture equipment market in North America during 2024. The US agriculture machinery market has seen upward movement and continues to rise further on grounds of technology advancement, higher demand for crop production, and favorable government policies. According to USDA 2024 data, total expenditures by U.S. farms (not including Alaska and Hawaii) were USD 481.9 billion in 2023, up 6.5% from USD 452.5 billion in 2022. This increase in expenditure can be attributed to the integration of precision farming technologies, including GPS-guided systems and autonomous machinery, which enhance efficiency in operations. Companies like John Deere and AGCO are market leaders, heavily investing in innovative products that meet the diverse needs of modern farming. These factors also contribute to the dynamics within the market as it transitions to sustainable farming practices and obtains government support for green technology. Export opportunities for U.S. manufacturers place the nation among the leaders for the production of agricultural equipment worldwide.

EUROPE AGRICULTURE EQUIPMENT MARKET ANALYSIS

Europe's agricultural machinery market is growing steadily through the EU's Common Agricultural Policy and demand for far more efficient farming technologies. The European Commission report shows that the value of EU agricultural production was EUR 223.9 Billion (USD 236.81 Billion) in 2023, thus driving up demand for advanced equipment. Key markets in the region include Germany, France, and the UK. Increasing adoption of precision agriculture technologies, like drone-assisted farming and automated machinery, is another factor driving the market expansion. The strict environmental policies of the EU force manufacturers to develop environment-friendly machinery like low-emission variants and energy-efficient systems. The leading companies in the manufacture of agricultural equipment include CLAAS and CNH Industrial, focusing on innovating through technology with sustainable inputs. Besides this, government support, R&D activities and regional cooperation encourage innovation, making Europe a significant market globally for the farming equipment sector.

ASIA PACIFIC AGRICULTURE EQUIPMENT MARKET ANALYSIS

Agriculture in the Asia Pacific region is fast-growing and expected to boom further due to rising food demand, increasing mechanization in agriculture, and support by

governments for rural development. In India, agricultural output in 2021-22 stood at USD 50.2 Billion with emphasis on mechanization enhancing the country's farm productivity. Japan, South Korea, and Australia have also invested in modernized equipment like drones and automatic tractors. Precision farming technologies that include satellite navigation and sensors are becoming popular; this boosts the market. Partnerships between local and international players, such as Mahindra & Mahindra with SANY, lead to innovation and an extensive market. The Asia-Pacific region will become a notable production and sales hub for farm equipment with increasing disposable incomes as well as export opportunities in the region.

LATIN AMERICA AGRICULTURE EQUIPMENT MARKET ANALYSIS

Latin America's agricultural equipment market is growing due to improved agricultural output, increased farm mechanization, and government incentives in modernizing the agriculture sector. According to the Inter-American Development Bank (IDB), Latin America's agricultural exports rose 18.8% in 2022, mainly driven by higher commodity prices. The biggest agricultural economies in the region have been heavily investing in the mechanization of agriculture and making it more productive and less labor intensive. The ministry of agriculture in Brazil made allocation of USD 9.2 billion during 2023 to accelerate modernization of agriculture which entails the usage of tractors as well as harvesters. Other vital markets are Argentina, Chile, and Mexico, which are also implementing machinery for the production of food items. The region is seeing more interest in sustainable farming practices, with government programs supporting the development of eco-friendly machinery. Major manufacturers such as Kubota and AGCO dominate the market, while local players such as Semeato are expanding their reach. Latin America's growing agricultural exports further strengthen the demand for agricultural equipment.

MIDDLE EAST AND AFRICA AGRICULTURE EQUIPMENT MARKET ANALYSIS

The agricultural equipment market in the Middle East and Africa is growing since countries are looking to modernize their farming sectors and combat food security challenges. According to data from the African Development Bank, approximately 60% of the working population in Africa is engaged in agriculture. Countries like South Africa, Kenya, and Egypt are experiencing acceleration in the adoption of mechanization. Tractors and irrigation systems are in high demand in the market. Water management and precision agriculture technologies have become necessary in North Africa and thus boost the market growth. International and local producers have also increased market access through partnerships, as represented by John Deere, who collaborated with

local African distributors to make more high-end technologies accessible. The agricultural machinery market in the Middle East and Africa is growing with good government support, investments in countryside infrastructure, and rising demand for highly efficient farming solutions.

COMPETITIVE LANDSCAPE:

Key players in the market, such as Deere & Company, CNH Industrial N.V., AGCO Corporation, and Mahindra & Mahindra Ltd., are focusing on technological advancements, product diversification, and strategic partnerships to strengthen their market position. They are heavily investing in precision agriculture technologies, including GPS-enabled machinery, autonomous tractors, and smart farming solutions, to address the growing demand for efficiency and sustainability in farming practices. Additionally, these companies are expanding their regional footprints through acquisitions and collaborations to tap into emerging markets. Emphasis on electric and hybrid machinery is also gaining momentum.

The report provides a comprehensive analysis of the competitive landscape in the agriculture equipment market with detailed profiles of all major companies, including:

AGCO Corporation

Agromaster Agricultural Machinery

Argo Tractors S.p.A.

Bellota Agrisolutions

China National Machinery Industry Corporation

CLAAS KGaA mbH

CNH Industrial N.V.

Deere & Company

Escorts Kubota Limited

Iseki & Co. Ltd.

JC Bamford Excavators Ltd

Mahindra & Mahindra Ltd.

SDF Group

KEY QUESTIONS ANSWERED IN THIS REPORT

1. What is agriculture equipment?
2. How big is the agriculture equipment market?
3. What is the expected growth rate of the global agriculture equipment market during 2026-2034?
4. What are the key factors driving the global agriculture equipment market?
5. What is the leading segment of the global agriculture equipment market based on equipment type?
6. What is the leading segment of the global agriculture equipment market based on application?
7. What is the leading segment of the global agriculture equipment market based on sales channel?
8. What are the key regions in the global agriculture equipment market?
9. Who are the key players/companies in the global agriculture equipment market?

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