

# **Haying Machinery Market Outlook 2026-2034: Market Share, and Growth Analysis By End-User (Large farm, Small and medium farm), By Product (Balers, Mowers, Tedders and rakes)**

<https://marketpublishers.com/r/HFA98D9C342CEN.html>

Date: November 2025

Pages: 160

Price: US\$ 3,950.00 (Single User License)

ID: HFA98D9C342CEN

## **Abstracts**

The Haying Machinery Market is valued at USD 16.63 billion in 2025 and is projected to grow at a CAGR of 6.5% to reach USD 29.31 billion by 2034.

### **Haying Machinery Market**

Haying machinery spans the full forage workflow - mowers/conditioners, tedders, rakes/mergers, balers (small square, large square, round), wrappers, and self-propelled forage solutions - used by dairy and beef producers, commercial hay growers, mixed farms, and custom contractors. Demand is shaped by volatile weather windows, stricter forage quality targets, and labor constraints, all of which favor equipment that cuts time per acre and preserves leaf and nutrient content. Top applications include dairy TMR feeding, beef wintering, export-grade alfalfa/Timothy, equine hay, and on-farm fodder security; secondary use-cases include biomass and bedding. Key trends feature precision haymaking (on-board moisture and density sensors, bale ID and traceability), telematics for fleet and job management, ISOBUS task control, auto-guided swathing and raking, plus wrapper-baler combos that reduce handling losses. Electrification and hybrid drivelines are emerging in smaller classes, while high-hp machines improve fuel efficiency and throughput. Drivers include structural labor shortages, higher livestock productivity goals, rising export hay flows, and the need to de-risk short curing windows due to climate variability. The competitive landscape blends global majors and specialist forage brands: full-line OEMs integrate end-to-end platforms; forage pure-plays differentiate on bale quality, durability, and serviceability; and regional manufacturers address price-sensitive segments. Differentiation hinges on dealer coverage, parts

logistics during peak season, financing/leasing options, and residual values in the used market. Aftermarket kits (knife beds, conditioners, net/wrap systems) and subscription software (bale mapping, job records) are becoming part of total cost of ownership, as producers seek predictable uptime and consistent feed quality.

## Haying Machinery Market Key Insights

Precision haymaking becomes standard. Moisture, ash, and density sensing with bale-by-bale IDs enable targeted storage, ration formulation, and premium sorting. Producers value audit trails that link field, date, and weather to final feed quality.

Weather risk compresses time. Narrow curing windows push demand for wider cutterbars, higher conditioning intensity, fast-fold frames, and mergers that present uniform windrows for maximum baler throughput with minimal leaf loss.

Labor scarcity drives automation. Auto-steer, headland sequences, and ISOBUS task control reduce operator load. In contractors' fleets, telematics allocate machines, track jobs, and document bales delivered for transparent billing.

Baler mix is segmenting. Large square balers dominate export and high-throughput operations; premium round balers with variable chambers suit mixed farms. Net, film, and twine systems compete on knot integrity, density, and wrap cost.

Wrapper–baler integration grows. Combination units cut field passes and oxygen exposure, improving fermentation in silage and haylage. Inline and satellite wrappers find roles based on logistics, storage footprint, and labor availability.

Durability and serviceability matter. Heavy-duty drivetrains, protected drivelines, and quick-change knives reduce downtime at peak. OEMs emphasize easy service points, common parts across models, and dealer uptime guarantees.

Data enters the ration. Bale mapping, moisture/density logs, and field variability layers feed into nutrition software, linking agronomy to animal performance and supporting premium hay claims for contract buyers.

Powertrain evolution is pragmatic. Electrification advances in small implements, while high-horsepower classes focus on fuel-efficient hydraulics, PTO

management, and reduced losses in conditioners and pickups.

Channel and financing edge. Strong dealer networks, seasonal parts staging, rental/lease packages, and buy-back programs influence purchasing more than spec sheets - especially for contractors balancing multi-brand fleets.

Used market shapes new sales. Healthy residual values and refurb programs lower lifecycle cost. OEM-certified pre-owned balers and mowers provide an entry path for emerging markets and smallholders.

## Haying Machinery Market Regional Analysis

### North America

Large dairy and beef operations emphasize throughput, bale density, and dealer support during short weather windows. Contractors expand fleets with telematics for job tracking and operator safety. Export-grade Western hay supports large square baler adoption, while mixed farms rely on premium round balers and wrapper combos. Financing flexibility, parts availability during season, and integration with farm management software are decisive.

### Europe

Smaller, irregular fields and environmental standards favor nimble mowers, mergers that minimize soil contamination, and precise conditioners to protect leaf. Contractor-driven models prioritize transport width, roadability, and ISOBUS compatibility across mixed fleets. High forage quality targets in dairy regions sustain demand for large square balers and advanced wrappers, with growing interest in lower-emission powertrains and noise reduction.

### Asia-Pacific

Mechanization accelerates in emerging dairy belts, with price-aligned round balers and rugged mowers leading adoption. Australia/New Zealand premium hay exporters invest in large square balers, mergers, and bale ID for traceability. Japan and South Korea value compact, high-precision equipment with strong dealer service; India and Southeast Asia seek durable, easy-service machines and rising access to rental/contracting models.

## Middle East & Africa

Water constraints and feed import reliance drive interest in high-density baling, efficient conditioning, and silage solutions that preserve nutrients. Gulf producers adopt contractor services and premium gear for large dairies; in Africa, robust, simple implements and parts availability matter most. Anti-counterfeit in twine/net and dependable wrap supply chains are practical concerns.

## South & Central America

Beef and dairy expansion supports round balers and high-capacity rakes/mergers, with large square balers growing in export-oriented corridors. Contractors demand transportable, easy-to-maintain machines and responsive dealer parts. Climate variability elevates wrapper adoption for haylage, while financing programs and used equipment pipelines influence fleet refresh cycles.

## Haying Machinery Market Segmentation

### By End-User

Large farm

Small and medium farm

### By Product

Balers

Mowers

Tedders and rakes

## Key Market players

John Deere, CNH Industrial, AGCO Corporation, CLAAS, Krone, Kubota, Kuhn Group, Kverneland Group, Pöttinger, Vermeer, McHale, SDF Group, Yanmar, Sitrex, H&S

## Manufacturing

### Haying Machinery Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modelling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends. Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behaviour are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

### Haying Machinery Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption. Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

### Countries Covered

#### North America — Haying Machinery market data and outlook to 2034

United States

Canada

Mexico

#### Europe — Haying Machinery market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

#### Asia-Pacific — Haying Machinery market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

#### Middle East and Africa — Haying Machinery market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Haying Machinery market data and outlook to 2034

Brazil

Argentina

Chile

Peru

\* We can include data and analysis of additional countries on demand.

### Research Methodology

This study combines primary inputs from industry experts across the Haying Machinery value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

### Key Questions Addressed

What is the current and forecast market size of the Haying Machinery industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

## Your Key Takeaways from the Haying Machinery Market Report

Global Haying Machinery market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Haying Machinery trade, costs, and supply chains

Haying Machinery market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Haying Machinery market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Haying Machinery market trends, drivers, restraints, and opportunities

Porter’s Five Forces analysis, technological developments, and Haying Machinery supply chain analysis

Haying Machinery trade analysis, Haying Machinery market price analysis, and Haying Machinery supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Haying Machinery market news and developments

## Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

\* The updated report will be delivered within 3 working days

## Contents

### **1. TABLE OF CONTENTS**

- 1.1 List of Tables
- 1.2 List of Figures

### **2. GLOBAL HAYING MACHINERY MARKET SUMMARY, 2025**

- 2.1 Haying Machinery Industry Overview
  - 2.1.1 Global Haying Machinery Market Revenues (In US\$ billion)
- 2.2 Haying Machinery Market Scope
- 2.3 Research Methodology

### **3. HAYING MACHINERY MARKET INSIGHTS, 2024-2034**

- 3.1 Haying Machinery Market Drivers
- 3.2 Haying Machinery Market Restraints
- 3.3 Haying Machinery Market Opportunities
- 3.4 Haying Machinery Market Challenges
- 3.5 Tariff Impact on Global Haying Machinery Supply Chain Patterns

### **4. HAYING MACHINERY MARKET ANALYTICS**

- 4.1 Haying Machinery Market Size and Share, Key Products, 2025 Vs 2034
- 4.2 Haying Machinery Market Size and Share, Dominant Applications, 2025 Vs 2034
- 4.3 Haying Machinery Market Size and Share, Leading End Uses, 2025 Vs 2034
- 4.4 Haying Machinery Market Size and Share, High Growth Countries, 2025 Vs 2034
- 4.5 Five Forces Analysis for Global Haying Machinery Market
  - 4.5.1 Haying Machinery Industry Attractiveness Index, 2025
  - 4.5.2 Haying Machinery Supplier Intelligence
  - 4.5.3 Haying Machinery Buyer Intelligence
  - 4.5.4 Haying Machinery Competition Intelligence
  - 4.5.5 Haying Machinery Product Alternatives and Substitutes Intelligence
  - 4.5.6 Haying Machinery Market Entry Intelligence

### **5. GLOBAL HAYING MACHINERY MARKET STATISTICS – INDUSTRY REVENUE, MARKET SHARE, GROWTH TRENDS AND FORECAST BY SEGMENTS, TO 2034**

5.1 World Haying Machinery Market Size, Potential and Growth Outlook, 2024- 2034 (\$ billion)

5.1 Global Haying Machinery Sales Outlook and CAGR Growth By End-User, 2024- 2034 (\$ billion)

5.2 Global Haying Machinery Sales Outlook and CAGR Growth By Product, 2024- 2034 (\$ billion)

5.3 Global Haying Machinery Sales Outlook and CAGR Growth By Segmentation<sup>3</sup>, 2024- 2034 (\$ billion)

5.4 Global Haying Machinery Market Sales Outlook and Growth by Region, 2024- 2034 (\$ billion)

## **6. ASIA PACIFIC HAYING MACHINERY INDUSTRY STATISTICS – MARKET SIZE, SHARE, COMPETITION AND OUTLOOK**

6.1 Asia Pacific Haying Machinery Market Insights, 2025

6.2 Asia Pacific Haying Machinery Market Revenue Forecast By End-User, 2024- 2034 (USD billion)

6.3 Asia Pacific Haying Machinery Market Revenue Forecast By Product, 2024- 2034 (USD billion)

6.4 Asia Pacific Haying Machinery Market Revenue Forecast By Segmentation<sup>3</sup>, 2024- 2034 (USD billion)

6.5 Asia Pacific Haying Machinery Market Revenue Forecast by Country, 2024- 2034 (USD billion)

6.5.1 China Haying Machinery Market Size, Opportunities, Growth 2024- 2034

6.5.2 India Haying Machinery Market Size, Opportunities, Growth 2024- 2034

6.5.3 Japan Haying Machinery Market Size, Opportunities, Growth 2024- 2034

6.5.4 Australia Haying Machinery Market Size, Opportunities, Growth 2024- 2034

## **7. EUROPE HAYING MACHINERY MARKET DATA, PENETRATION, AND BUSINESS PROSPECTS TO 2034**

7.1 Europe Haying Machinery Market Key Findings, 2025

7.2 Europe Haying Machinery Market Size and Percentage Breakdown By End-User, 2024- 2034 (USD billion)

7.3 Europe Haying Machinery Market Size and Percentage Breakdown By Product, 2024- 2034 (USD billion)

7.4 Europe Haying Machinery Market Size and Percentage Breakdown By Segmentation<sup>3</sup>, 2024- 2034 (USD billion)

7.5 Europe Haying Machinery Market Size and Percentage Breakdown by Country,

2024- 2034 (USD billion)

7.5.1 Germany Haying Machinery Market Size, Trends, Growth Outlook to 2034

7.5.2 United Kingdom Haying Machinery Market Size, Trends, Growth Outlook to 2034

7.5.2 France Haying Machinery Market Size, Trends, Growth Outlook to 2034

7.5.2 Italy Haying Machinery Market Size, Trends, Growth Outlook to 2034

7.5.2 Spain Haying Machinery Market Size, Trends, Growth Outlook to 2034

## **8. NORTH AMERICA HAYING MACHINERY MARKET SIZE, GROWTH TRENDS, AND FUTURE PROSPECTS TO 2034**

8.1 North America Snapshot, 2025

8.2 North America Haying Machinery Market Analysis and Outlook By End-User, 2024-2034 (\$ billion)

8.3 North America Haying Machinery Market Analysis and Outlook By Product, 2024-2034 (\$ billion)

8.4 North America Haying Machinery Market Analysis and Outlook By Segmentation<sup>3</sup>, 2024- 2034 (\$ billion)

8.5 North America Haying Machinery Market Analysis and Outlook by Country, 2024-2034 (\$ billion)

8.5.1 United States Haying Machinery Market Size, Share, Growth Trends and Forecast, 2024- 2034

8.5.1 Canada Haying Machinery Market Size, Share, Growth Trends and Forecast, 2024- 2034

8.5.1 Mexico Haying Machinery Market Size, Share, Growth Trends and Forecast, 2024- 2034

## **9. SOUTH AND CENTRAL AMERICA HAYING MACHINERY MARKET DRIVERS, CHALLENGES, AND FUTURE PROSPECTS**

9.1 Latin America Haying Machinery Market Data, 2025

9.2 Latin America Haying Machinery Market Future By End-User, 2024- 2034 (\$ billion)

9.3 Latin America Haying Machinery Market Future By Product, 2024- 2034 (\$ billion)

9.4 Latin America Haying Machinery Market Future By Segmentation<sup>3</sup>, 2024- 2034 (\$ billion)

9.5 Latin America Haying Machinery Market Future by Country, 2024- 2034 (\$ billion)

9.5.1 Brazil Haying Machinery Market Size, Share and Opportunities to 2034

9.5.2 Argentina Haying Machinery Market Size, Share and Opportunities to 2034

## **10. MIDDLE EAST AFRICA HAYING MACHINERY MARKET OUTLOOK AND**

## **GROWTH PROSPECTS**

10.1 Middle East Africa Overview, 2025

10.2 Middle East Africa Haying Machinery Market Statistics By End-User, 2024- 2034  
(USD billion)

10.3 Middle East Africa Haying Machinery Market Statistics By Product, 2024- 2034  
(USD billion)

10.4 Middle East Africa Haying Machinery Market Statistics By Segmentation<sup>3</sup>, 2024-  
2034 (USD billion)

10.5 Middle East Africa Haying Machinery Market Statistics by Country, 2024- 2034  
(USD billion)

10.5.1 Middle East Haying Machinery Market Value, Trends, Growth Forecasts to  
2034

10.5.2 Africa Haying Machinery Market Value, Trends, Growth Forecasts to 2034

## **11. HAYING MACHINERY MARKET STRUCTURE AND COMPETITIVE LANDSCAPE**

11.1 Key Companies in Haying Machinery Industry

11.2 Haying Machinery Business Overview

11.3 Haying Machinery Product Portfolio Analysis

11.4 Financial Analysis

11.5 SWOT Analysis

## **12 APPENDIX**

12.1 Global Haying Machinery Market Volume (Tons)

12.1 Global Haying Machinery Trade and Price Analysis

12.2 Haying Machinery Parent Market and Other Relevant Analysis

12.3 Publisher Expertise

12.2 Haying Machinery Industry Report Sources and MethodologyOGAMV25R0302

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