

# **Agricultural Haying Forage Machinery Market Forecasts to 2032 – Global Analysis By Machinery Type (Balers, Mowers, Forage Harvesters, Rakes & Tedders, Windrowers, Fodder Processors, Conditioners, and Other Machinery Types), Operation Type, Application, and By Geography**

<https://marketpublishers.com/r/AD3A6A25BDA8EN.html>

Date: September 2025

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: AD3A6A25BDA8EN

## **Abstracts**

According to Statistics MRC, the Global Agricultural Haying Forage Machinery Market is accounted for \$9.18 billion in 2025 and is expected to reach \$12.34 billion by 2032 growing at a CAGR of 4.3% during the forecast period. Agricultural haying and forage machinery refers to specialized equipment used in the cultivation, harvesting, processing, and handling of forage crops like hay, silage, and pasture plants. These machines assist farmers in cutting, raking, baling, chopping, and transporting fodder efficiently, reducing manual labor and improving productivity. They play a crucial role in ensuring quality feed for livestock, optimizing crop yield, and supporting modern, mechanized farming practices across diverse agricultural settings.

According to FAOSTAT, the area harvested under cowpea grew from 15.3 million hectares in 2022 to 15.4 million hectares in 2023, enhancing the use of forage harvesters and increasing the demand for haying and forage machinery.

Market Dynamics:

Driver:

Increasing demand for animal feed

The rising global demand for livestock products is fueling the need for efficient forage harvesting solutions. Haying and forage machinery are increasingly adopted to meet the growing requirement for high-quality feed across dairy, poultry, and cattle sectors. These machines enable timely harvesting and preservation of nutritional value, which is critical for animal health and productivity. Farmers are investing in advanced balers, mowers, and rakes to optimize feed output and reduce post-harvest losses. The expansion of commercial livestock farms and feedlots is further accelerating machinery uptake. As feed demand intensifies, haying equipment is becoming indispensable for scalable and sustainable animal husbandry.

#### Restraint:

##### High initial investment costs

The cost of advanced equipment such as self-propelled forage harvesters or high-capacity balers can be prohibitive for small and mid-sized farms. This financial barrier limits adoption, especially in regions with fragmented landholdings or low mechanization rates. Additional expenses related to maintenance, fuel, and skilled labor compound the investment challenge. While leasing and cooperative ownership models are emerging, they are not yet widespread enough to offset the restraint. Consequently, high initial costs remain a key hurdle to broader market penetration.

#### Opportunity:

##### Growing adoption of precision and sustainable agriculture

The shift toward precision farming is creating new opportunities for haying and forage machinery manufacturers. Farmers are increasingly integrating GPS-guided mowers and sensor-equipped balers to enhance efficiency and reduce waste. These technologies support sustainable practices by optimizing input use and minimizing soil compaction. Government subsidies and sustainability mandates are encouraging adoption of eco-friendly harvesting solutions. Innovations in automation and data analytics are also enabling better crop monitoring and yield forecasting. As agriculture modernizes, forage machinery is evolving to align with precision and sustainability goals.

#### Threat:

##### Intense competition and market consolidation

Large multinational players are expanding their portfolios and acquiring smaller firms to strengthen market share. This consolidation is narrowing choices for buyers and intensifying pricing battles. Smaller manufacturers often struggle to compete on technology, distribution, and after-sales service. Rapid innovation cycles and brand loyalty further reinforce the dominance of established players. As a result, market fragmentation is declining, and competitive intensity is reshaping industry dynamics.

### Covid-19 Impact

The COVID-19 pandemic disrupted the agricultural machinery supply chain, delaying equipment deliveries and maintenance schedules. Lockdowns and labor shortages hindered field operations, affecting forage harvesting timelines. However, the essential nature of livestock farming helped sustain baseline demand for haying equipment. The crisis underscored the importance of reliable, low-maintenance machinery in ensuring feed continuity. Post-pandemic recovery has been supported by renewed investments in mechanization and rural infrastructure.

The balers segment is expected to be the largest during the forecast period

The balers segment is expected to account for the largest market share during the forecast period, driven by rising demand for efficient feed management and labor-saving technologies. Advancements such as variable chamber designs, moisture sensors, and automation features are enhancing productivity and bale quality. Emerging trends include integration with GPS and telematics for precision farming and real-time monitoring. Key developments involve compact, high-density balers suited for small farms and export markets. Sustainability goals are also pushing innovation in fuel-efficient and electrically powered models.

The medium farms segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the medium farms segment is predicted to witness the highest growth rate, due to their push for mechanization and cost-efficiency. These farms are adopting mid-range balers, mowers, and tedders equipped with GPS guidance, moisture sensors, and semi-autonomous controls. Emerging trends include modular equipment designs and compatibility with farm management software. Key developments involve compact, multi-functional machines tailored for mixed cropping systems. Government subsidies and cooperative ownership models are also boosting

access. As technology scales down, medium farms are becoming a key growth segment for forage machinery.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to increased mechanization, labor shortages, and rising livestock feed demand. Technological advancements such as automated systems, precision agriculture tools, and self-driving harvesters are boosting operational efficiency. Notable trends include smart baler adoption and autonomous farming pilots in countries like Japan and China. Leading manufacturers, including Kubota and Deere & Company, are investing heavily in innovation to enhance yield quality and reduce costs, driving further growth across the region.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, propelled by increasing demand for livestock feed, labor shortages, and supportive mechanization initiatives. Technological advancements such as GPS-guided equipment, smart harvesters, and IoT-enabled systems are reshaping operations. Sustainability is a rising priority, with innovations aimed at minimizing fuel consumption and crop loss. Recent milestones include Canada's push for agri-tech growth and the widespread use of intelligent balers and forage tools that enhance productivity and resource efficiency across the region.

Key players in the market

Some of the key players profiled in the Agricultural Haying Forage Machinery Market include John Deere, Mahindra & Mahindra Ltd., AGCO Corporation, SIP Strojna Industrija d.d., CNH Industrial, Tonutti Wolagri Group, Kubota Corporation, Mascar S.p.A., Krone Group, Alamo Group Inc., Kuhn Group, Iseki & Co., Ltd., Vermeer Corporation, Yanmar Co., Ltd., and CLAAS KGaA mbH.

Key Developments:

In September 2025, John Deere announced the introduction of the V452M round baler to the North American lineup, providing enhanced productivity and precision to larger-scale hay and forage operations. The V452M headlines the newly updated lineup of VR and CR round baler models, introducing a new naming convention and advanced

features purpose-built for heavy crop and silage conditions, while the current 1 Series round balers remain and continue to serve customers with their baling needs.

In September 2025, Tech Mahindra and Abacus Insights announced a strategic partnership to enable seamless compliance and modernize healthcare data interoperability. The partnership will streamline and accelerate the implementation lifecycle for U.S. healthcare payers required to comply with the Centers for Medicare & Medicaid Services (CMS) Interoperability and Priority Authorization Final Rule (CMS-0057-F).

#### Machinery Types Covered:

Balers

Mowers

Forage Harvesters

Rakes & Tedders

Windrowers

Fodder Processors

Conditioners

Other Machinery Types

#### Operation Types Covered:

Tractor-mounted

Self-propelled

Pull-type

#### Applications Covered:

Small Farms

Medium Farms

Large Farms

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market

estimations

- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

### **2 PREFACE**

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
  - 2.4.1 Data Mining
  - 2.4.2 Data Analysis
  - 2.4.3 Data Validation
  - 2.4.4 Research Approach
- 2.5 Research Sources
  - 2.5.1 Primary Research Sources
  - 2.5.2 Secondary Research Sources
  - 2.5.3 Assumptions

### **3 MARKET TREND ANALYSIS**

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Application Analysis
- 3.7 Emerging Markets
- 3.8 Impact of Covid-19

### **4 PORTERS FIVE FORCE ANALYSIS**

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

### **5 GLOBAL AGRICULTURAL HAYING FORAGE MACHINERY MARKET, BY**

*Agricultural Haying Forage Machinery Market Forecasts to 2032 – Global Analysis By Machinery Type (Balers, Mow...*

## **MACHINERY TYPE**

- 5.1 Introduction
- 5.2 Balers
  - 5.2.1 Round Balers
  - 5.2.2 Square Balers
- 5.3 Mowers
  - 5.3.1 Disc Mowers
  - 5.3.2 Sickle Bar Mowers
- 5.4 Forage Harvesters
  - 5.4.1 Self-Propelled
  - 5.4.2 Tractor-Mounted
- 5.5 Rakes & Tedders
  - 5.5.1 Rotary Rakes
  - 5.5.2 Tedders
  - 5.5.3 Wheel Rakes
- 5.6 Windrowers
- 5.7 Fodder Processors
- 5.8 Conditioners
- 5.9 Other Machinery Types

## **6 GLOBAL AGRICULTURAL HAYING FORAGE MACHINERY MARKET, BY OPERATION TYPE**

- 6.1 Introduction
- 6.2 Tractor-mounted
- 6.3 Self-propelled
- 6.4 Pull-type

## **7 GLOBAL AGRICULTURAL HAYING FORAGE MACHINERY MARKET, BY APPLICATION**

- 7.1 Introduction
- 7.2 Small Farms
- 7.3 Medium Farms
- 7.4 Large Farms

## **8 GLOBAL AGRICULTURAL HAYING FORAGE MACHINERY MARKET, BY GEOGRAPHY**

- 8.1 Introduction
- 8.2 North America
  - 8.2.1 US
  - 8.2.2 Canada
  - 8.2.3 Mexico
- 8.3 Europe
  - 8.3.1 Germany
  - 8.3.2 UK
  - 8.3.3 Italy
  - 8.3.4 France
  - 8.3.5 Spain
  - 8.3.6 Rest of Europe
- 8.4 Asia Pacific
  - 8.4.1 Japan
  - 8.4.2 China
  - 8.4.3 India
  - 8.4.4 Australia
  - 8.4.5 New Zealand
  - 8.4.6 South Korea
  - 8.4.7 Rest of Asia Pacific
- 8.5 South America
  - 8.5.1 Argentina
  - 8.5.2 Brazil
  - 8.5.3 Chile
  - 8.5.4 Rest of South America
- 8.6 Middle East & Africa
  - 8.6.1 Saudi Arabia
  - 8.6.2 UAE
  - 8.6.3 Qatar
  - 8.6.4 South Africa
  - 8.6.5 Rest of Middle East & Africa

## **9 KEY DEVELOPMENTS**

- 9.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 9.2 Acquisitions & Mergers
- 9.3 New Product Launch
- 9.4 Expansions

## 9.5 Other Key Strategies

## 10 COMPANY PROFILING

- 10.1 John Deere
- 10.2 Mahindra & Mahindra Ltd.
- 10.3 AGCO Corporation
- 10.4 SIP Strojna Industrija d.d.
- 10.5 CNH Industrial
- 10.6 Tonutti Wolagri Group
- 10.7 Kubota Corporation
- 10.8 Mascar S.p.A.
- 10.9 Krone Group
- 10.10 Alamo Group Inc.
- 10.11 Kuhn Group
- 10.12 Iseki & Co., Ltd.
- 10.13 Vermeer Corporation
- 10.14 Yanmar Co., Ltd.
- 10.15 CLAAS KGaA mbH

## List Of Tables

### LIST OF TABLES

Table 1 Global Agricultural Haying Forage Machinery Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Agricultural Haying Forage Machinery Market Outlook, By Machinery Type (2024-2032) (\$MN)

Table 3 Global Agricultural Haying Forage Machinery Market Outlook, By Balers (2024-2032) (\$MN)

Table 4 Global Agricultural Haying Forage Machinery Market Outlook, By Round Balers (2024-2032) (\$MN)

Table 5 Global Agricultural Haying Forage Machinery Market Outlook, By Square Balers (2024-2032) (\$MN)

Table 6 Global Agricultural Haying Forage Machinery Market Outlook, By Mowers (2024-2032) (\$MN)

Table 7 Global Agricultural Haying Forage Machinery Market Outlook, By Disc Mowers (2024-2032) (\$MN)

Table 8 Global Agricultural Haying Forage Machinery Market Outlook, By Sickle Bar Mowers (2024-2032) (\$MN)

Table 9 Global Agricultural Haying Forage Machinery Market Outlook, By Forage Harvesters (2024-2032) (\$MN)

Table 10 Global Agricultural Haying Forage Machinery Market Outlook, By Self-Propelled (2024-2032) (\$MN)

Table 11 Global Agricultural Haying Forage Machinery Market Outlook, By Tractor-Mounted (2024-2032) (\$MN)

Table 12 Global Agricultural Haying Forage Machinery Market Outlook, By Rakes & Tedders (2024-2032) (\$MN)

Table 13 Global Agricultural Haying Forage Machinery Market Outlook, By Rotary Rakes (2024-2032) (\$MN)

Table 14 Global Agricultural Haying Forage Machinery Market Outlook, By Tedders (2024-2032) (\$MN)

Table 15 Global Agricultural Haying Forage Machinery Market Outlook, By Wheel Rakes (2024-2032) (\$MN)

Table 16 Global Agricultural Haying Forage Machinery Market Outlook, By Windrowers (2024-2032) (\$MN)

Table 17 Global Agricultural Haying Forage Machinery Market Outlook, By Fodder Processors (2024-2032) (\$MN)

Table 18 Global Agricultural Haying Forage Machinery Market Outlook, By Conditioners

(2024-2032) (\$MN)

Table 19 Global Agricultural Haying Forage Machinery Market Outlook, By Other Machinery Types (2024-2032) (\$MN)

Table 20 Global Agricultural Haying Forage Machinery Market Outlook, By Operation Type (2024-2032) (\$MN)

Table 21 Global Agricultural Haying Forage Machinery Market Outlook, By Tractor-mounted (2024-2032) (\$MN)

Table 22 Global Agricultural Haying Forage Machinery Market Outlook, By Self-propelled (2024-2032) (\$MN)

Table 23 Global Agricultural Haying Forage Machinery Market Outlook, By Pull-type (2024-2032) (\$MN)

Table 24 Global Agricultural Haying Forage Machinery Market Outlook, By Application (2024-2032) (\$MN)

Table 25 Global Agricultural Haying Forage Machinery Market Outlook, By Small Farms (2024-2032) (\$MN)

Table 26 Global Agricultural Haying Forage Machinery Market Outlook, By Medium Farms (2024-2032) (\$MN)

Table 27 Global Agricultural Haying Forage Machinery Market Outlook, By Large Farms (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

## I would like to order

Product name: Agricultural Haying Forage Machinery Market Forecasts to 2032 – Global Analysis By Machinery Type (Balers, Mowers, Forage Harvesters, Rakes & Tedders, Windrowers, Fodder Processors, Conditioners, and Other Machinery Types), Operation Type, Application, and By Geography

Product link: <https://marketpublishers.com/r/AD3A6A25BDA8EN.html>

Price: US\$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/AD3A6A25BDA8EN.html>