

Harvesters Market Forecasts to 2032 – Global Analysis By Type (Combine Harvesters, Forage Harvesters, Sugarcane Harvesters, Potato Harvesters and Other Types), Mode of Operation, Propulsion Type, Crop Type, Application and By Geography

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Abstracts

According to Statistics MRC, the Global Harvesters Market is accounted for \$42.3 billion in 2025 and is expected to reach \$75.0 billion by 2032 growing at a CAGR of 8.5% during the forecast period. Harvesters are machines or devices used in agriculture to efficiently gather crops from fields. These machines can perform multiple tasks, such as cutting, threshing, and separating grains from the stalks, which significantly reduces the time and labor required for harvesting. There are different types of harvesters tailored to specific crops, such as combine harvesters for grains, cotton pickers, and potato harvesters. Modern harvesters are often equipped with advanced technology, including GPS and sensors, to optimize performance and minimize crop damage. The use of harvesters has revolutionized farming, improving productivity, reducing costs, and ensuring a more consistent harvest.

According to the data obtained from the Association of Equipment Manufacturers, the sales of self-propelled combine harvesters in the United States increased by 15.8% in 2022 over the last year.

Market Dynamics:

Driver:

Increasing global population and food demand

The increasing global population and rising food demand are key drivers of growth in the market. As the global population continues to surge, particularly in developing regions, the need for higher agricultural productivity intensifies. This escalating demand for food places pressure on farmers to adopt efficient and high-capacity harvesting solutions. Additionally, urbanization and shrinking arable land further necessitate mechanized farming practices, boosting demand for advanced harvesters that can maximize yield while minimizing labor and time constraints in modern agriculture.

Restraint:

Limited access to financing and credit

Limited access to financing and credit negatively impacts the market by restricting farmers, especially small and medium-sized operators, from investing in modern harvesting equipment. High upfront costs of harvesters make credit essential for adoption. Without adequate financing, many farmers continue using outdated, inefficient methods, leading to lower productivity and higher labor costs. This slows the overall growth of the market and widens the gap between technologically advanced large farms and resource-constrained smaller operations, limiting market expansion and agricultural efficiency.

Opportunity:

Expansion of large-scale farming operations

The expansion of large-scale farming operations is a significant driver in the market. As farms grow in size, especially in regions like North America, Europe, and parts of Asia, the need for high-capacity, efficient harvesting equipment becomes paramount. Advanced harvesters, such as combine and forage harvesters, enable farmers to manage vast areas of crops effectively, reducing labor costs and time. Government incentives and subsidies further encourage the adoption of these technologies, promoting agricultural modernization and enhancing productivity .

Threat:

Lack of skilled labor for operation and maintenance

The lack of skilled labor for the operation and maintenance of harvesters poses a

significant challenge to the market. Modern harvesters require technical knowledge for efficient use and regular servicing. Without trained operators and technicians, machines are prone to misuse and breakdowns, leading to increased downtime and repair costs. This deters potential buyers, especially in rural and developing regions, from investing in advanced equipment. As a result, market growth slows, and the full benefits of mechanized harvesting remain underutilized.

Covid-19 Impact

The COVID-19 pandemic significantly impacted the global market, causing disruptions in supply chains, labor shortages, and shifts in demand. Manufacturers faced challenges such as increased production costs due to limited access to components and raw materials, leading to higher machinery prices. In regions like India, restrictions on the movement of harvesting equipment during lockdowns resulted in temporary shortages, especially for paddy and wheat harvesting. While some farmers managed to arrange alternative machinery services, others experienced delays and increased rental costs. Despite these challenges, the agricultural machinery sector showed resilience, with some markets witnessing strong demand driven by favorable weather conditions and government support for sustainable farming practices.

The combine harvesters segment is expected to be the largest during the forecast period

The combine harvesters segment is expected to account for the largest market share during the forecast period. These machines efficiently combine reaping, threshing, and winnowing into a single operation, significantly reducing labor and time. As demand for high-efficiency agricultural equipment grows, combine harvesters have gained prominence due to their productivity and ability to handle large-scale farming. Technological advancements, including GPS and automation features, are further boosting their adoption, making them indispensable in modern agriculture and enhancing overall market growth.

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

Over the forecast period, the agriculture segment is predicted to witness the highest growth rate. With growing global food needs and shrinking rural workforces, modern harvesting equipment has become essential. Harvesters, particularly combine harvesters, help optimize crop yield and operational efficiency. Technological integration

in agriculture, such as precision farming and automation, is further fueling market growth. As sustainable and large-scale farming practices expand, the role of advanced harvesters in agriculture becomes increasingly vital.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to rapid mechanization of agriculture, rising labor shortages, and growing demand for food due to population growth. Government support through subsidies and policies promoting modern farming practices further boosts adoption. Technological advancements, such as GPS-enabled and autonomous harvesters, enhance efficiency and appeal to large-scale farmers. Countries like China and India are investing heavily in agricultural infrastructure, making the region a hotspot for harvester market growth in the coming years.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR. Policies and subsidies aimed at modernizing agriculture encourage investment in advanced harvesting equipment. Growing emphasis on sustainable farming practices drives the adoption of energy-efficient and eco-friendly harvesters. Additionally, the integration of automation, GPS, and AI in harvesters enhances efficiency and precision, making them more attractive to large-scale farmers.

Key players in the market

Some of the key players profiled in the Harvesters Market include Deere & Company, CNH Industrial, CLAAS KGaA mbH, AGCO Corporation, Kubota Corporation, Yanmar Co., Ltd., Mahindra & Mahindra Ltd., Tractors and Farm Equipment (TAFE) Ltd., PREET Group, Kartar Agro Industries Pvt. Ltd., Dasmesh Group, Balkar Combines, Sonalika Group, Iseki & Co., Ltd., Sampo Rosenlew Ltd., Rostselmash and SDF S.p.A.

Key Developments:

In January 2024, CNH Industrial N.V. announced investment of around USD 167 million (EUR 150 million) for expanding its production facility and R&D capabilities at the New Holland Harvesting Center of Excellence located in Belgium. Through the investment, the company redesigned the assembly line and logistics area to streamline the manufacturing of CR11.

In August 2023, Swaraj Tractors, a brand of Mahindra&Mahindra Ltd. launched the Swaraj 8200 Wheel Harvester. The harvester featured an intelligent system including live location tracking, fuel consumption, distance traveled, and acres harvested.

Types Covered:

Combine Harvesters

Forage Harvesters

Sugarcane Harvesters

Potato Harvesters

Other Types

Mode of Operations Covered:

Manual

Semi-Automatic

Automatic/Autonomous

Propulsion Types Covered:

Non-Electric

Electric

Crop Types Covered:

Cereals

Oilseeds

Fruits and Vegetables

Fiber Crops

Sugar Crops

Applications Covered:

Agriculture

Fodder Harvesting

Horticulture

Research and Development

Other Applications

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

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