

# **Haying and Forage Equipment Market Forecasts to 2032 – Global Analysis By Equipment Type (Mowers, Balers, Tedders, Rakes, Forage Harvesters and Other Equipment Types), Operation (Semi-Automatic and Fully Automatic), Power Source, Application, End User and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Haying and Forage Equipment Market is accounted for \$10.03 billion in 2025 and is expected to reach \$15.18 billion by 2032 growing at a CAGR of 6.10% during the forecast period. Haying and forage equipment refers to a variety of agricultural tools that are essential for feeding livestock and are used for the harvesting, processing, and storage of forage crops, such as grass, alfalfa, and clover. Each of these pieces of equipment—mowers, tedders, rakes, balers, and forage harvesters—has a distinct function in the haymaking process, from cutting and drying to gathering and baling. Modern haying and forage equipment is made to be more efficient, save labor costs, and maintain the forage's nutritional value. Moreover, this equipment is crucial for contemporary dairy and livestock farming operations because of technological developments like automated controls and GPS integration that have further optimized operations.

According to the European agricultural machinery association (CEMA), volume sales of machinery are projected to decline by up to 10% this year.

Market Dynamics:

Driver:

## Growing interest in livestock products

Dairy, beef, and other animal products are becoming more and more popular due to the world's population growth, urbanization, and rising incomes, especially in emerging economies. Livestock farmers require a steady and superior supply of forage crops like hay, alfalfa, and silage in order to meet this growing demand. In order to guarantee prompt harvesting, effective storage, and minimal nutritional loss, farmers are forced to rely on sophisticated haying and forage equipment. The health and productivity of livestock are directly supported by high-performance equipment, which guarantees that the forage is harvested at its highest nutritional value. Furthermore, as the livestock industry continues to grow, so does the market for haying and forage equipment.

### Restraint:

#### Exorbitant startup and ownership expenses

The substantial initial outlay required to acquire sophisticated machinery is one of the main factors limiting the market for haying and forage equipment. Machines like precision mowers, round balers, and self-propelled forage harvesters demand large capital expenditures, frequently amounting to tens or even hundreds of thousands of dollars. Small and medium-sized farmers frequently cannot afford such costs without outside financial assistance, particularly in developing nations. The total cost of ownership also includes the purchase price plus additional expenses for fuel, maintenance, replacement parts, and skilled operator training. Additionally, these monetary barriers impede the rate of adoption, especially for cost-conscious users who might stick with manual or traditional approaches.

### Opportunity:

#### Creation of personalized equipment for small and medium-sized farms

Although many developed markets are dominated by large-scale commercial farms, the majority of agricultural holdings worldwide are still small and medium-sized farms. For these smaller operations, there is an increasing demand for haying and forage equipment that is small, inexpensive, and simple to maintain. Businesses can take advantage of this underutilized market by creating machines that are modular, multipurpose, or have less horsepower. For instance, tractor-mounted mowers or small balers designed for fields smaller than 20 acres are growing in popularity. Manufacturers can establish a significant presence in this market by emphasizing

flexibility in financing options and low-cost innovation.

Threat:

Increasing low-cost manufacturer competition

Manufacturers from nations with lower production costs, like China, India, and Turkey, are becoming more competitive in the global market. These businesses are appealing to price-conscious markets in Africa, Southeast Asia, and Latin America because they frequently provide comparable or basic-functional haying and forage equipment at much lower prices. Many small and medium-sized farmers rely on these inexpensive alternatives to meet their basic needs, even though they might not be as durable or technologically advanced as premium brands. Moreover, the market share and profitability of well-known brands are at risk due to this trend, which forces them to reduce prices or improve their value proposition.

Covid-19 Impact:

The market for haying and forage equipment was severely disrupted by the COVID-19 pandemic because it caused labour shortages, supply chain disruptions, and delayed equipment purchases because of the global economic uncertainty that farmers faced. Production and distribution of machinery components were hindered by lockdowns and transportation restrictions, which resulted in delays and higher manufacturing costs. Reduced on-farm labor availability also had an impact on timely harvesting operations, which in turn affected the need for replacement or new equipment. However, as farmers looked to maximize productivity with limited workforce access, the pandemic also accelerated the adoption of automation and precision agriculture technologies.

The PTO-driven (power take-off) segment is expected to be the largest during the forecast period

The PTO-driven (power take-off) segment is expected to account for the largest market share during the forecast period. PTO-driven machinery provides dependable and effective power transmission straight from tractors, which is why tractor-powered equipment is so common in haying and forage operations. Unlike hydraulic and electric power alternatives, PTO-driven systems are more adaptable, simpler to integrate with current farm equipment, and less expensive to operate. Moreover, their strong performance and versatility in different farming environments make them the go-to option for farmers, creating substantial market demand and maintaining their top spot in

this market.

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

Over the forecast period, the silage segment is predicted to witness the highest growth rate. Increased use of silage techniques, which support higher livestock productivity due to their superior nutritional value and improved forage quality preservation, is what is driving this growth. Demand is further increased by improvements in silage-making machinery, such as harvesters and balers, which increase productivity and lower labor expenses. Additionally, the growing demand for silage in contemporary agriculture is also a result of growing awareness of sustainable farming methods and the requirement for year-round fodder availability.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share. The region's vast agricultural infrastructure, high rates of adoption of cutting-edge farming technologies, and significant government support for agricultural mechanization are all factors contributing to its dominance. Due to its extensive livestock industry, large-scale farming operations, and emphasis on sustainable farming methods, the United States leads the market in particular. Furthermore, North America's dominant position in the market is further supported by the existence of significant producers of agricultural equipment and continuous technological advancements.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. The expansion of livestock farming, growing agricultural mechanization, and encouraging government policies are the main drivers of this growth. To meet the rising demand for food and increase farm productivity, nations like China and India are making significant investments in modernizing their agricultural sectors. The adoption of sophisticated haying and forage machinery is being driven by the growing demand for high-quality forage in emerging economies. Moreover, the market in the area is distinguished by the growing accessibility of reasonably priced equipment, the development of better infrastructure, and the rising recognition of the advantages of mechanized agriculture.

Key players in the market

Some of the key players in Haying and Forage Equipment Market include Alamo Group Inc., John Deere & Company, Krone NA, Inc., AGCO Corporation, CNH Industrial N.V., Kubota Corporation, Vermeer Corporation, Buhler Industries Inc., Kuhn Group, Massey Ferguson Ltd., Claas KGaA, Hesston Corporation, Lely International N.V., Kverneland Group GmbH and Pottinger Landtechnik GmbH.

#### Key Developments:

In May 2025, CNH Industrial N.V. CNH has inked a deal with Starlink, a SpaceX subsidiary, to deliver cutting-edge satellite connectivity to farmers. This collaboration will provide users of CNH's brands, Case IH, New Holland and STEYR, with reliable and cost-effective high-speed connectivity, even in the most remote rural areas.

In July 2024, AGCO Corporation announced it has entered into a definitive agreement to sell the majority of its Grain & Protein business to American Industrial Partners ('AIP') in an all-cash transaction valued at \$700 million, subject to working capital and other customary closing adjustments.

In January 2024, Deere & Company announced it has entered into an agreement with SpaceX to provide cutting-edge satellite communications (SATCOM) service to farmers. Utilizing the industry-leading Starlink network, this solution will allow farmers facing rural connectivity challenges to fully leverage precision agriculture technologies.

#### Equipment Types Covered:

Mowers

Balers

Tedders

Rakes

Forage Harvesters

Other Equipment Types

#### Operations Covered:

Semi-Automatic

Fully Automatic

Power Sources Covered:

PTO-Driven (Power Take-Off)

Hydraulic Power

Electric Power

Applications Covered:

Hay

Grass/Alfalfa

Straw

Silage

Other Applications

End Users Covered:

Livestock Farming

Dairy Farming

Forage Harvesting & Processing

Other End Users

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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