

Italy Tractor Market - Industry Analysis & Forecast 2022-2028

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Report description:

Italy tractor market is expected to grow at a CAGR of 3.74% during 2021-2028.

Italy is Europe's third-largest tractor market. The top three biggest agricultural tractor markets in Europe - Germany, France, and Italy, account for almost four agricultural tractors out of 10 registered in Europe. The Italian economy achieved excellent growth in 2021. The growth rate is expected to sustain in 2023, supported by the rising employment rate and a monetary policy stance that will continue to support domestic demand. Consequently, 2022 is expected to witness a healthy increment of 4.5% in real GDP growth. The agricultural Tractor Market in Italy grew by 35.9% in 2021 compared to 2020. In 2021, the gross value added of agriculture, forestry, and fishery recorded a 3.9% growth at current prices but a sharp decline of -4.4% in terms of volume, due to the collapse of wine production (-14%) and fruit (-6.1%), in the context of a significant increase in sales price. The Government of Italy's schemes and initiatives to facilitate credit and improve agriculture-related operations are the major drivers contributing to the growth of the overall value chain in the Italy agricultural sector. The Italian agricultural sector has historically been crucial in developing the economy; the industry plays a vital role in increasing the country's income by adding value to the following:

- Supplementing industries and agri-businesses
- Increasing income of the workforce engaged both directly and indirectly in the agriculture sector.
- Improving the foreign exchange trade balance as agriculture products are essential exports

The 50-100 HP segment has generated the highest sales.

-□The increased use of tractors in the power range of 50-100 HP is due to their ability to effectively carry out all tasks in the field, including soil preparation, irrigation, weeding, harvesting, and haulage. These farm tractors have the power to perform the required farming tasks and are also used in several other ways, such as operating generators for irrigation and running both companies and domestically made harvesters and threshers. The labor shortage and reducing agriculture production costs have triggered the demand for this segment in the Italian market.

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50-100 HP tractors accounted for the largest share of the Italy Tractor Market.

-□ In terms of regions, North-East and North-West reportedly showed a higher share of agriculture tractors in 2021 than the country's other regions due to a higher level of mechanization.

-□ The region's principal crops are wheat and rice, and these crops constitute 40% and 28%, respectively, of the total crop production. The Northeast region is one of the leading regions with high compact and medium HP tractors penetration.

-□ During the forecast period, the South region is expected to witness substantial growth in the agriculture tractors market at a CAGR of 5.03%, driven by the increasing number of landholdings caused due to land fragmentation.

-□ 50-100 HP tractors accounted for the largest share in the North-east region in 2021 due to their compact size and flexible operational capabilities. The demand for 50-100 HP is expected to grow significantly during the forecast period.

Italy tractor market is led by 2WD tractors.

-□ Ease of driving and maneuverability during light loads and plain fields are significant factors boosting the demand for two-wheel-drive tractors. Older farmers majorly use 2WD tractors as they are skeptical about using new machines and are more comfortable with traditional 2WD tractors than 4WD tractors. Popular brands including CNH, John Deere, New Holland, and AGCO are the preferred choices among farmers in the 2WD segment in Italy. Italy has many medium-scale farmers, with a 7.9 ha/farm average farm size. For this reason, farmers prefer to own a medium HP range and cost-efficient tractors, which positively impacts the 2WD segment.

The Italian tractor market is the new frontier of growth & innovation.

-□ Italy, a new frontier of innovation is emerging as agriculture meets digital technologies, opening various paths to an intelligent agricultural future. Smart agriculture will happen with the help of multiple technologies such as self-driving or autonomous tractors and GPS technology, among others. Self-driving or autonomous tractors can help farmers reduce working hours. However, there is a vast potential for data monitoring.

Export-centric approach apart from domestic sales.

The export of tractors manufactured in Italy will witness growth as the prominent vendors adopt an export-centric approach to increase their net revenues. John Deere acquired the company "Beer Flag Robotics" in the year 2021 for \$250 million to gain access to the advanced (autonomous driving technology) equipment market and expand to other countries by enhancing sales in Italy.

Segmentation by Horsepower

-□ Less than 50 HP

-□ 50-100 HP

-□ 101-150 HP

-□ 151-200 HP

-□ 201-300 HP

-□ 301-400 HP

-□ above 400 HP

Segmentation by Drive Type

-□ 2-Wheel Drive

-□ 4-Wheel Drive

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Segmentation by Region

- Italy
- o□North-West
- o□North-East
- o□Centre
- o□South
- o□Islands

Competitive Landscape

- The agriculture tractor market in Italy has the presence of established players in various segments, including open fields and vineyards. The threat to the existing vendors in the country from new vendors is relatively low due to the long replacement cycle of tractors and increasing demand for used and certified tractors.
- Vendors are improving their aftersales services, making customers loyal to the existing brands.
- Vendors have started to sell certified pre-owned tractors under their brand name; prices for such tractors are nearly half the price of a new tractor.
- The Italy tractor market is dominated by companies with a comprehensive portfolio of offerings for any usage.
- The key players in the Italy agriculture tractor market are CNH Industrial and SDF Group.
- In terms of units sold, CNH and SDF Group are the market leaders, accounting for more than 40% of the overall Italy agriculture tractors market in 2021.
- The report covers company ranking across product offerings by HP ranges

Key Vendors

- CNH Industrial
- AGCO
- John Deere
- Kubota

Other Prominent Vendors

- SDF
- Antonio Carraro
- ACE
- TAFE
- Iseki
- Deutz-Fahr
- Mahindra & Mahindra
- Yanmar
- Escorts

WHY SHOULD YOU BUY THIS REPORT?

This report is among the few in the market that offers an outlook and opportunity analysis forecast in terms of:

- Market Size & Forecast Volume (Units) 2019-2028
- o□Segmentation by Horsepower
- o□Segmentation by Wheel-Drive
- o□Segmentation by Regions (Federal States)
- Production and trade values
- Major current & upcoming projects & investments

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- Gain competitive intelligence about the economic scenario, advantages in Italy, market dynamics, and market share
- Latest & innovative technologies
- Import & Export analysis
- COVID-19 impact analysis of the market
- Company Profile of primary and other prominent vendors
- Market share of major vendors

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