

Turkey Tractors Market - Industry Analysis and Forecast 2022-2028

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Report description:

The Turkey tractors market is expected to grow at a CAGR of 5.79% during 2022-2028

The 50-75HP segment accounted for the largest share due to its compact size and flexible operational capabilities. Turkey is the 18th largest economy in the world, with a gross domestic product (GDP) and Turkey's agricultural economy is the 7th largest economy in the world.

Turkey is also one of the largest countries in the middle east In terms of agricultural acreage. Arable land covers 35.5% of the territory, while forest covers 15%. As of 2019, there are around 23.7 million hectares of cultivable land. Irrigation covers 18.4% of cultivable land. Vegetable products make for 76% of overall agricultural output, followed by animal husbandry and forestry, with forestry and fishery contributing the least. Most of the vegetable product is made up of fruits and field crops, with wheat being the most common.

The Turkey economy achieved excellent growth in 2021, and 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 2% in real GDP growth.

Turkey's agricultural tractors market grew by a massive growth of 83.5% in 2020 compared to 2019. The increase in crop production and tractor sales was due to favorable monsoon rains in 2020 and 2021, which helped the country recover from the COVID-19 pandemic.

The 50-75 HP Segment has Generated the Highest Sales.

In 2021, Turkey's 50-75 HP agricultural tractors market recorded high growth. The primary factor for the steady growth of the medium-power range of tractors is the increased business turnover among hobby and livestock farmers. The sales of Above 150 HP tractors in the country are expected to remain steady during the forecast period as farm sales are likely to stay the same in

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the coming years.

Segmentation by Horsepower

- Less Than 50 HP
- 50-75 HP
- 76-100 HP
- 101-150 HP
- Above 150 HP

Segmentation by Drive Type

- 2-Wheel-Drive
- 4-Wheel-Drive

Turkey Tractors Market & Segmentation by Region Type (Volume in Units)

In terms of region, the Central Anatolia and Black Sea regions of Turkey have reportedly shown a higher demand for agriculture tractors than the Eastern and Marmara region of the country. On the other hand, the Aegean and Mediterranean region of the country has a higher level of mechanization than any other country. Therefore, the strong demand for agricultural tractors is expected to come from the Central Anatolia region of the country during the forecast period.

The region's major crops are cereals and rice; the Central Anatolia region is one of the leading regions with a high penetration of medium size and Average (76-100) HP tractors.

50-75 HP range tractors accounted for the largest share in the Black Sea region in 2021 due to their compact size and flexible operational capabilities. The demand for 50-75 HP is expected to grow significantly with a CAGR of 6.45% during the forecast period.

2-Wheel-Drive Tractors led the Turkish Tractors Industry

Ease of driving and flexibility during light loads and plain fields are significant factors boosting the demand for two-wheel-drive tractors. Older farmers majorly use 2WD types as they are suspicious about using new machines and are more comfortable with traditional

2WD types than 4WD ones. Most retail brands, including New Holland, Tamosan, and Massey Ferguson, are Turkey's top preferred choices among farmers in the 2WD segment. Turkey has many medium-scale farmers, with an average farm size of 6 ha/farm. For this reason, farmers prefer to own a medium HP range and cost-efficient tractors, which positively impacts the 2WD segment.

Market by Zones

- Eastern Anatolia (Agri, Bingol, Elazig, Malatya, Hakkari, Ildir, Kars, Tunceli, and Van)
- Central Anatolia (Ankara, Cankiri, Eskisehir, Karaman, Kayseri, Konya, Sivas, and Yozgat)
- Aegean and Mediterranean (Aydin, Izmir, Manisa, Usak, Denizli, Adana, Antalya, Mersin, Burdur, Hatay, Isparta, and Osmaniye)
- Marmara (Edirne, Istanbul, Kizilirmaci, Kocaeli, Tekirdag, Yalova, and Bursa)
- Black Sea (Amasya, Gumushane, Bartin, Bolu, Giresun, Kastamonu, Karabuk, Ordu, Rize, Samsun, Sinop, Tokat, Trabzon, and Zonguldak)

TURKEY TRACTORS MARKET OPPORTUNITIES AND CHALLENGES

-□ High Local Production Capacities in Turkey

Turkey has a sizeable domestic tractor manufacturing base. A few prominent market players dominate tractor manufacturing.

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Eight manufacturing plants supply the majority of tractors for both domestic and international markets. The production of tractors for export accounts for a considerable share of the tractors produced in Turkey. Almost 9,000 tractors are exported annually from Turkey, accounting for nearly 35% of total tractor production.

-□Increasing Potential for Electric Tractors

Recently, electric vehicles are becoming more popular for various applications. Electric tractors are widely used in the industry for various indoor and outdoor applications. The rising trend of automation and increasing environmental concerns will accelerate growth. Farmers in developed countries are looking for electric tractors to reduce the cost of fuel and replace them with standard ones.

In 2021, US-based tractor manufacturer Soletrac announced the launch of its new 70 HP, 60 kWh electric tractor. They were specially designed for heavy-duty farm and vineyard operations. The tractor can run for up to eight hours on a single charge with a 60-kWh battery.

-□Declining Commodity Prices

Turkey witnessed declining prices for agricultural products such as rice, wheat, maize, and hazelnut in 2014. The average rice prices slightly increased in 2020 compared to the previous years. The decline in the prices of agricultural commodities coupled with the declining or stagnating growth rate could result in farmers being less willing to invest in new machinery, especially tractors.

COMPETITIVE LANDSCAPE

-□Turkey's agriculture tractors market has 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.

-□New Holland and Tumosan dominated the Turkey tractors market with a collective market share of over 52%. The threat of rivalry is high in the Turkey tractors market since more than 50% of the claim belongs to the top three key players. These players are thriving on innovation in the tractor market. They are increasingly investing in developing advanced agriculture tractor technology for precision farming and machine automation.

RECENT DEVELOPMENTS

-□In February 2022, Massey Ferguson launched the MF 6S series tractors. This machine provides up to 180 HP with advanced technology.

-□In February 2022, AGCO and AgRevolution showcased new solutions from Fendt, Massey Ferguson, and Hesston by Massey Ferguson at the National Farm Machinery in Louisville, Kentucky.

-□In July 2020, Massey Ferguson launched the MF 8S series tractors. This series of tractors is distinguished by a guard-u install engine and a neo-retro design. These tractors are designed to advance intelligent farming technologies.

VENDOR LANDSCAPE

The key manufacturers in the Turkey agriculture tractors market are New Holland, Tumosan, Erkunt, Deutz Fahr, and Massey Ferguson. In terms of units sold, New Holland and Tumosan are the market leaders, which accounted for more than 50% of the overall Turkey tractors market share in 2021. The report covers company ranking across product offerings by HP ranges

Key Vendors

- AGCO
- CNH Industrial
- John Deere
- TAFE
- Kubota

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Other Prominent Vendors

- SDF
- Action Construction Equipments Ltd (ACE)
- 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
- Gain competitive intelligence about the economic scenario, advantages in Turkey, 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

KEY QUESTIONS ANSWERED

- 1.□WHAT IS THE GROWTH RATE OF THE TURKEY TRACTORS MARKET?
- 2.□WHO ARE THE KEY PLAYERS IN THE TURKEY TRACTORS MARKET?
- 3.□TRACTORS WITH WHICH HORSEPOWER TYPE WILL CONSTITUTE THE LARGEST SHARE BY 2028 IN TURKEY?
- 4.□WHICH REGIONS IN TURKEY WILL WITNESS HIGHER DEMAND FOR AGRICULTURAL TRACTORS IN 2027?
- 5.□HOW MANY TRACTORS WILL BE SOLD IN 2027 IN TURKEY?

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